v4.9

OhioBuys

Connecting Buyers and Suppliers

Bidder and Supplier Learner Guide
Getting Started in OhioBuys

Published: April 2023

Audience: Bidders and Suppliers

Table of Contents

1) In This Document

2) Registering as a New Bidder

3) Accessing OhioBuys as an Existing Supplier

4) General Navigation

5) Managing Contacts

6) Selecting Commodities, Counties Served, and Providing Supplier Demographics

7) Uploading Documents

8) Submitting Bidder Change Requests

9) Accessing Additional Training Resources and Support

In This Document:

Overview: Welcome to the State of Ohio's new eProcurement solution, OhioBuys. OhioBuys is the State of Ohio's online purchasing solution that empowers both government buyers and interested Bidders and Suppliers. OhioBuys leverages innovative technologies to increase efficiency, opportunities, and participation with businesses in Ohio. This guide provides you with step-by-step instructions for accessing and navigating OhioBuys, as well as managing your company profile.

Definition of Terms Used Throughout This Guide:

Bidder: A company which is not currently doing business with the State. Bidders can view and respond to solicitations.

Supplier: A company which is currently doing business with the State. Suppliers can view and respond to solicitations, receive and fulfill purchase orders, and create advanced shipping notifications.

Functionality Covered:

1) **Registering as a New Bidder:** Suppliers who are not currently doing business with the State are still able to bid on solicitations posted on the OhioBuys public portal. In order to bid, a Bidder will need to create an OH|ID and complete a brief Bidder Registration Request.

2) **Accessing OhioBuys as an Existing Supplier:** Suppliers who are currently doing business with the State do not need to re-register in order to access OhioBuys. Each Supplier user will need to have their own OH|ID and be listed as a contact with an assigned role.

In This Document (continued):

Functionality Covered:

3) **General Navigation:** Explains the structure and content of OhioBuys including the homepage, navigational icons, main menu, action buttons, functional tabs and other navigational options.

4) **Manage Contacts:** Supplier Admins can add or delete contacts for their company within OhioBuys, as well as assign each contact a role aligning to the actions that they will be taking.

5) **Select Commodities:** Supplier Admins can add or delete commodities in their company profile, indicating to State users which commodities they are capable of supplying. When a solicitation is created for a certain commodity, State users are able to quickly notify all Suppliers who have indicated that they are capable of supplying that commodity.

6) **Accessing Additional Training Resources and Support:** Instructions for accessing additional training and support resources including videos, job aids and the Ohio Shared Services help desk team.

REGISTERING AS A NEW BIDDER

Overview:

- What's Covered: How to register your company to access OhioBuys
- When to Reference This Section: If your company is not currently doing business with the State, and is not already registered to view and respond to solicitations.

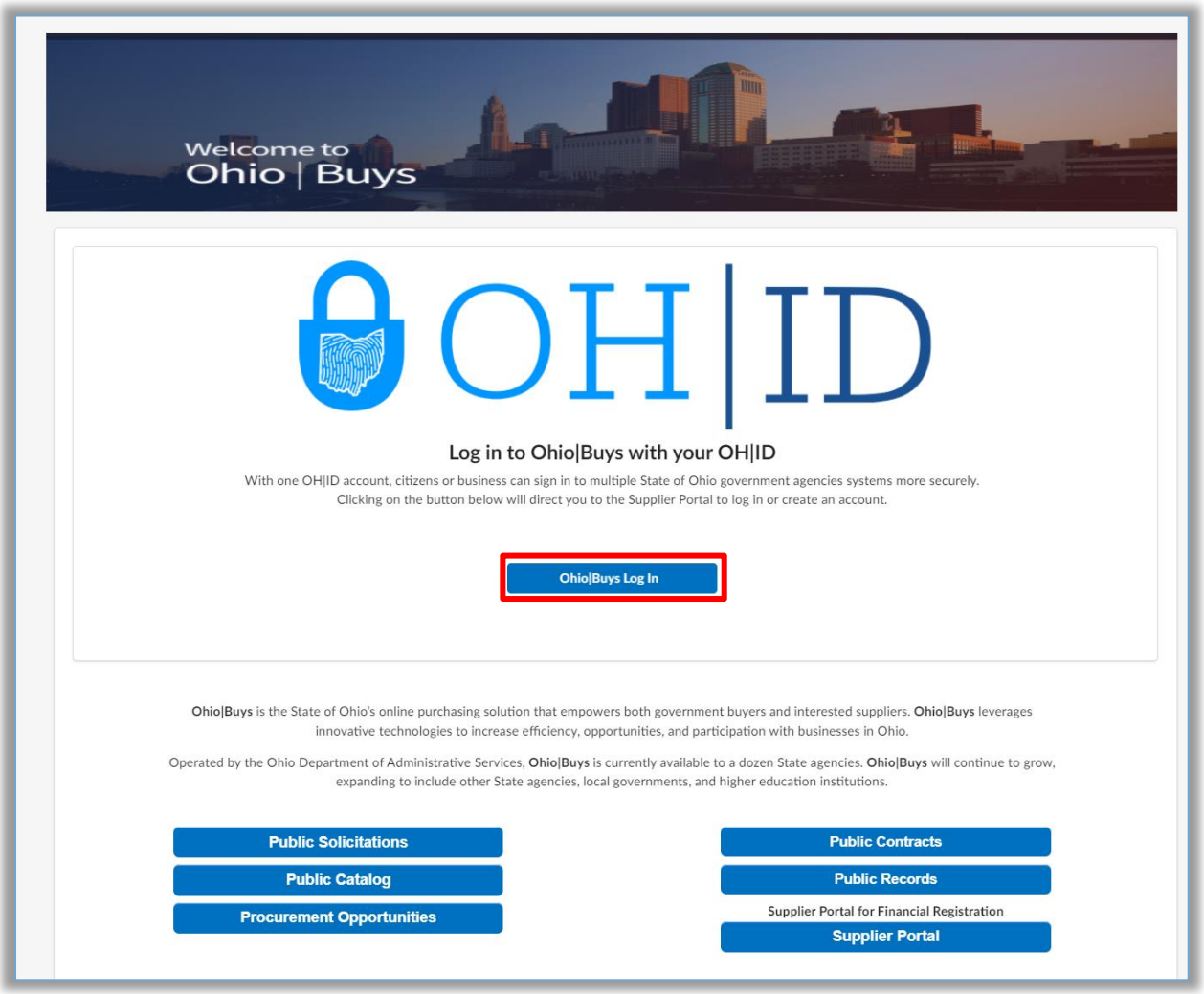
How to Register as a New Bidder

Step-by-Step Instructions for Registering as a New Bidder

1

- New Bidders should register and access OhioBuys prior to a bid's due date. Registering an OhioBuys account for your organization will ensure your company has access to, is familiar with, and is readily prepared to bid within OhioBuys when the time comes.

To begin this process, navigate to https://ohiobuys.ohio.gov/ and click **OhioBuys Log In.**



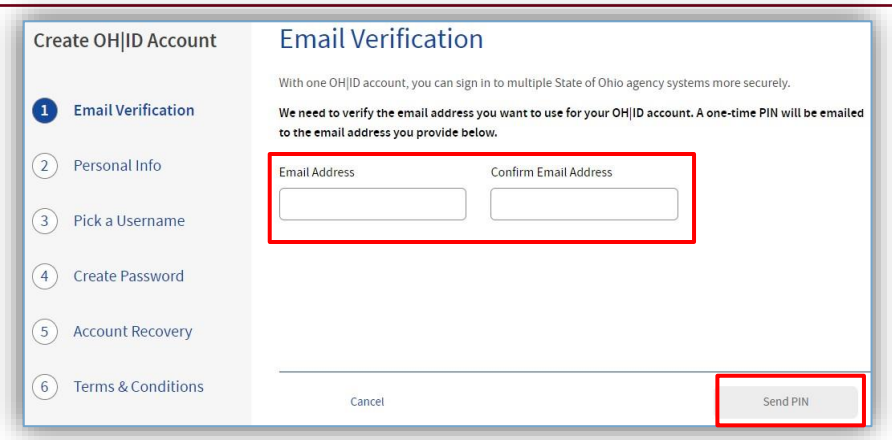
2

If you do not currently have an OH|ID, click **Create Account**, otherwise enter your login credentials and click **Log In.**

- An OH|ID is a secure, single sign-on that provides users access to online services for multiple State of Ohio systems. A valid OH|ID is required for each OhioBuys user.
- If you already have an OH|ID, proceed to Step 8.

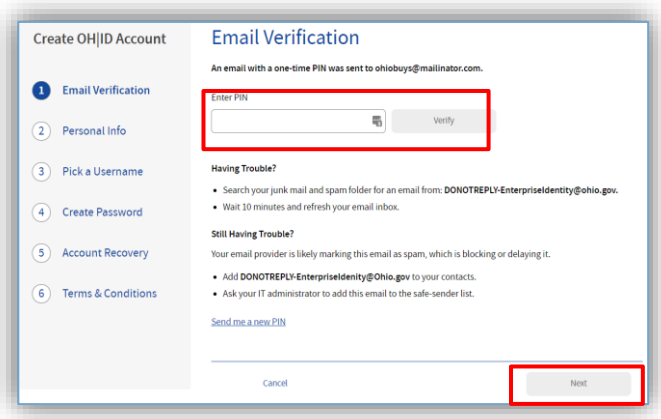
Step-by-Step Instructions for Registering as a New Bidder

3



First, enter your email address in the **Email Address** field and then again in the **Confirm Email Address** field and then click the **Send PIN** button. A one-time code will be sent to your email address.

4



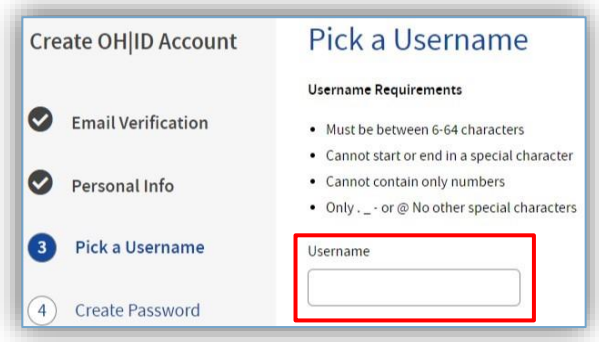
Input the code in the **Enter PIN** field, click **Verify,** and then click **Next.**

5

Insert your Personal information including **First Name**, **Last Name**, and **Date of Birth.** Then click **Next.**

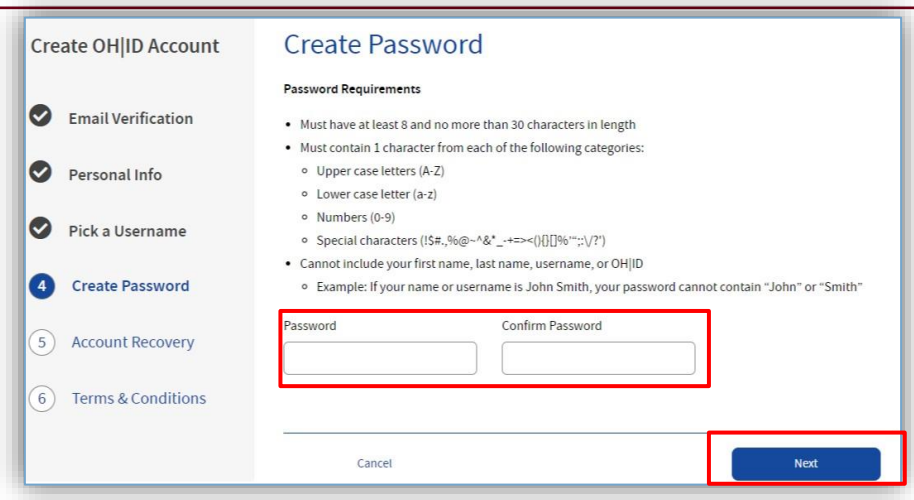
Step-by-Step Instructions for Registering as a New Bidder

6



Enter your desired **Username**. Your Username must be at least 6 and no more than 64 characters in length. It can contain upper- and lower-case letters, numbers and only ._- no other special characters. Then click **Next.**

7



Enter and confirm your password. Then click **Next.**

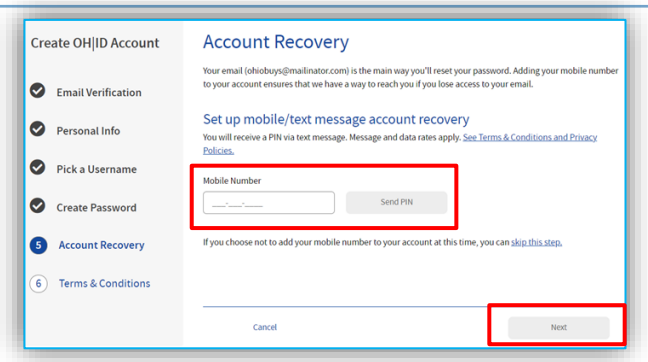
⚠ Your password must have at least 8 and no more than 30 characters in length and contain 1 character from each of the following categories:

- Upper case letters (A-Z)
- Lower case letter (a-z)
- Numbers (0-9)
- Special characters (!$#.,%@~^&*_-+=><(){}[]%'";:\/?`)

⚠ Your password cannot include your first name, last name, username, or OH|ID

Step-by-Step Instructions for Registering as a New Bidder

8



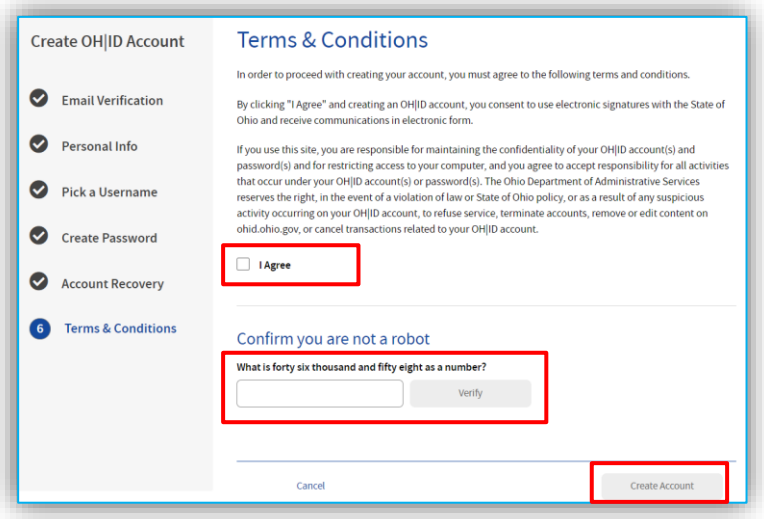
For account recovery, you are given the option to either:

a) Insert a phone number in the **Mobile Number** field and click **Send PIN.**

a) Bypass this step by clicking **skip this step.**

If you have completed the account recovery steps, click **Next** to continue.

9



a) Click the **I Agree** checkbox

b) Confirm you are not a robot by answering the v**erification question**

c) Click **Create Account** to finish creating your OH|ID

⚠ You will receive a confirmation email once your OH|ID has been created.

Click **Continue.** Enter your OH|ID credentials and click **Log In.**

Step-by-Step Instructions for Registering as a New Bidder

The Bidder Registration Request form is displayed. The individual who submits their company's Bidder Registration Request will automatically become the Supplier Administrator for the company's account when the Bidder Registration Request is approved. It is recommended that the person whom the company wishes to be their Administrator completes the registration.

Complete the following mandatory fields (any fields with a red asterisk are mandatory):

a) **Tax ID Number:** your unique tax identifier such as Taxpayer Identification Number (TIN)/Employer Identification Number (EIN).

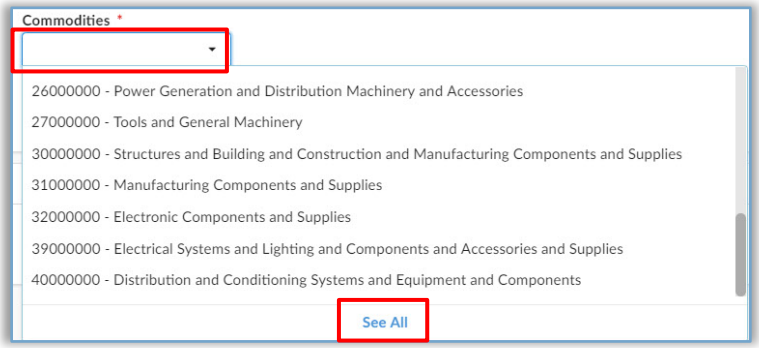
▲ You will be required to indicate if you are using your Social Security Number as your TIN.

b) **Legal Name:** legal name as shown on your income tax return.

c) **Secretary of State Charter/Entity Number:** please note if your organization is exempt, you can indicate this on this field.

d) **Address Information**, including: **Address Line 1, State/Province, City, Zip Code,** and **County.** You are able to update the **Country** field as needed.

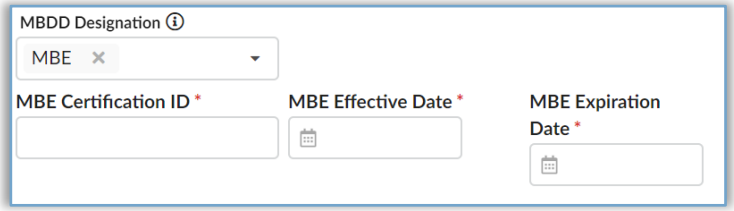
e) **Commodities:** Select the commodities your organization provides. You will be notified of solicitations containing the commodities which you select here. Click the **Selector** icon to view the complete list of commodities and then use the **Hand (** **)** icon to indicate which commodities you would like to select. You can also search for commodities by typing directly into the **Commodities field** and selecting an option from the search results



f) **Security Control** (similar to a CAPTCHA)

In addition to the aforementioned required fields, Bidders can also indicate:

▲ **MBDD Designation** (EDGE, MBE, WBE, and/or VBE): If you select an MBDD Designation**,** you must enter its corresponding **Certification ID, Effective Date,** and **Expiration Date.** Any MBDD Designations will be reviewed and validated with the State; and Bidders have to complete the formal certification process in the Ohio Business Gateway at business.ohio.gov beforehand in order for their information to be validated.



Step-by-Step Instructions for Registering as a New Bidder

11

- **Commodities**: Select the commodities your organization provides. You will be notified of solicitations containing the commodities which you select here. Click the **Selector** icon to view the complete list of commodities and then use the **Hand** icon to indicate which commodities you would like to select. You can also search for commodities by typing directly into the **Commodities field** and selecting an option from the search results.

In addition to the aforementioned required fields, Bidders can also indicate:

- **MBDD Designation** (EDGE, MBE, WBE, and/or VBE): If you select an MBDD Designation**,** you must enter its corresponding **Certification ID, Effective Date,** and **Expiration Date.** Any MBDD Designations will be reviewed and validated with the State; and Bidders have to complete the formal certification process in the Ohio Business Gateway at business.ohio.gov beforehand in order for their information to be validated.

12

After you have completed the required fields and added any supplementary information such as any MBDDD Designations and/or commodities. Click **Register** at the top of the page to submit your Bidder Registration Request.

- You will receive an email notification when the State of Ohio has reviewed and taken action on your request. If your request is approved, you will be able to click the confirmation link from the body of the email you received to log in and access OhioBuys.
- Once the Supplier Administrator logs in to their company's account, they will be able to add additional users to their account on the Contacts tab of their Supplier Profile. Please refer to the Manage Contacts section in this guide for details.

You have now completed the guide for this section. After your Bidder Registration Request is approved, please refer to the General Navigation section in the guide for details on how to navigate OhioBuys.

ACCESSING OHIOBUYS AS AN EXISTING SUPPLIER

Overview:

- What's Covered: How to access OhioBuys as an existing Supplier
- When to Reference This Section: If your company is currently doing business with the State, and you are a new or existing user for your company.

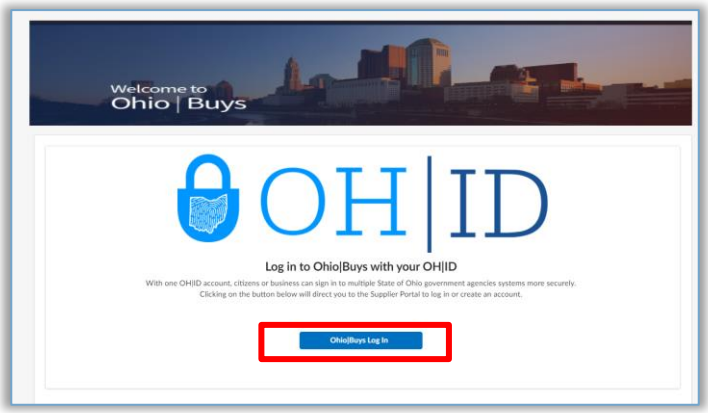
How to Access OhioBuys as an Existing Supplier

Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

- An existing Supplier is a business or organization that is fully registered to do business with the State, while a Bidder is a business or organization that wants to respond to an opportunity to do business with the State and is not currently a fully-registered State Supplier. New Bidders need to complete the Bidder Registration process in order to log in to OhioBuys. Please refer to Registering as a New Bidder in this guide for details.
- If you are a Requisite Program Supplier, please refer to the Requisite Program Supplier Log In job aid for details on how to log in.

1

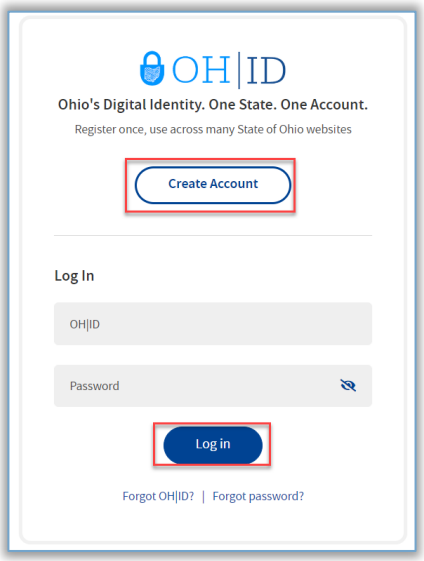
To begin this process, navigate to https://ohiobuys.ohio.gov/ and click **OhioBuys Log In.**



2

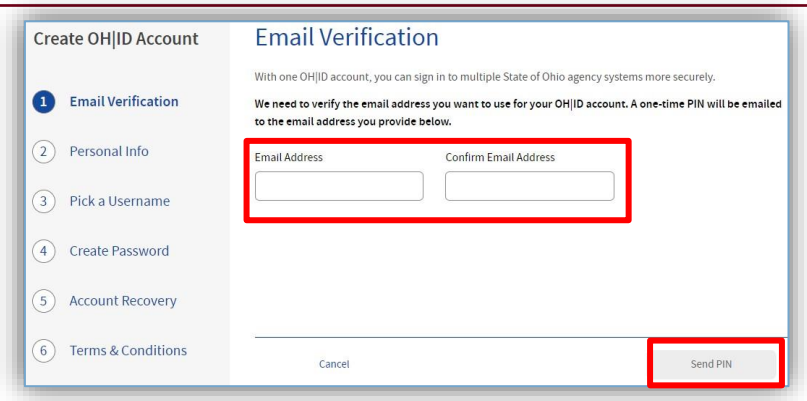
If you do not currently have an OH|ID, click **Create Account** and follow Steps 3-9 to complete the account creation process. Otherwise enter your login credentials (username and password), click **Log In**, and proceed to Step 10.

- An OH|ID is a secure, single sign-on that provides users access to online services for multiple State of Ohio systems. A valid OH|ID is required for each OhioBuys user.



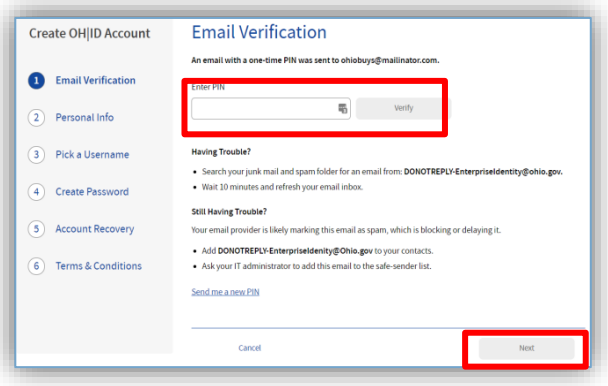
Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

3



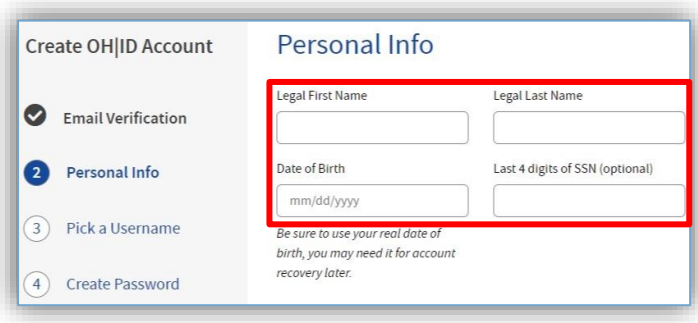
First, enter your email address in the **Email Address** field and then again in the **Confirm Email Address** field and then click the**Send PIN** button. A one-time code will be sent to your email address.

4



Input the code in the **Enter PIN** field, click **Verify,** and then click **Next.**

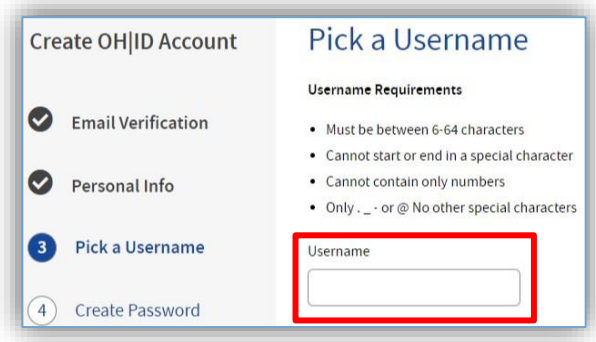
5



Insert your Personal information including **First Name**, **Last Name**, and **Date of Birth.** Then click **Next.**

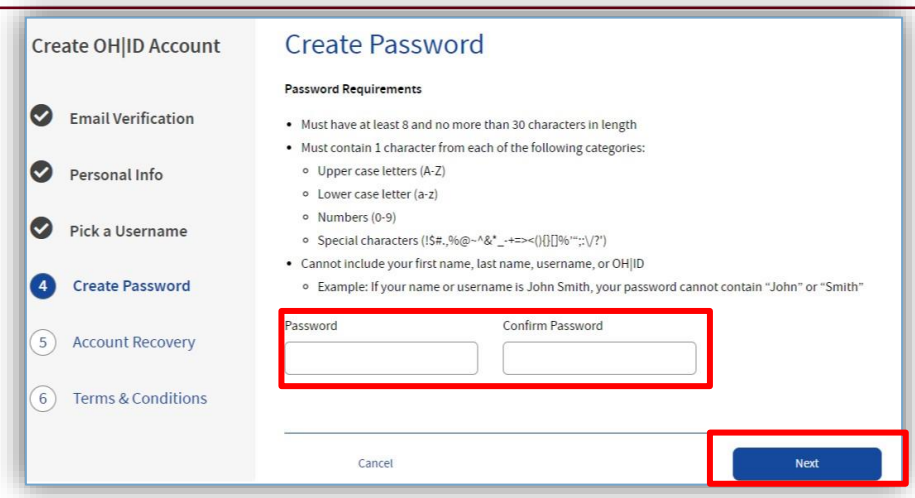
Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

6



Enter your desired **Username**. Your Username must be at least 6 and no more than 64 characters in length. It can contain upper- and lower-case letters, numbers and only ._- no other special characters. Then click **Next.**

7



Enter and confirm your password. Then click **Next.**

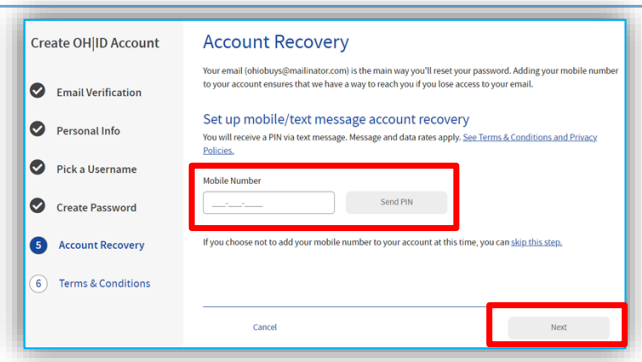
⚠ Your password must have at least 8 and no more than 30 characters in length and contain 1 character from each of the following categories:

- Upper case letters (A-Z)
- Lower case letter (a-z)
- Numbers (0-9)
- Special characters (!$#.,%@~^&*_-+=><(){}[]%'";:\/?`)

⚠ Your password cannot include your first name, last name, username, or OH|ID

Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

8



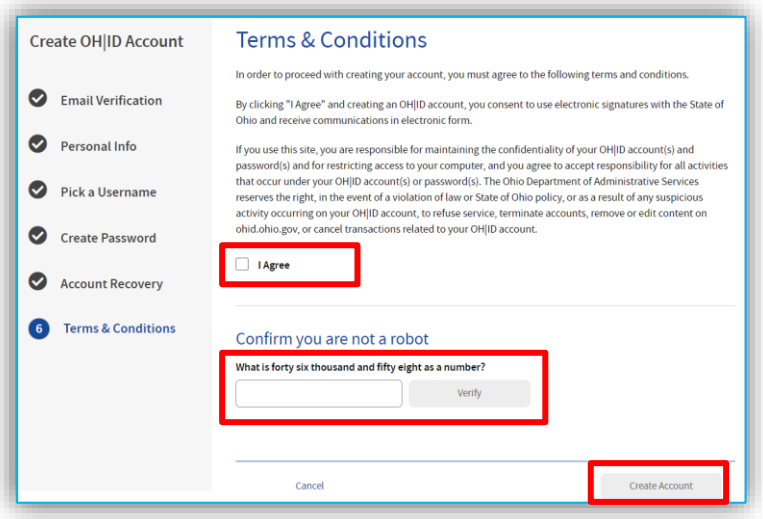
For account recovery, you are given the option to either:

a) Insert a phone number in the **Mobile Number** field and click **Send PIN.**

a) Bypass this step by clicking **skip this step.**

If you have completed the account recovery steps, click **Next** to continue.

9



a) Click the **I Agree** checkbox

b) Confirm you are not a robot by answering the v**erification question**

c) Click **Create Account** to finish creating your OH|ID

⚠ You will receive a confirmation email once your OH|ID has been created.

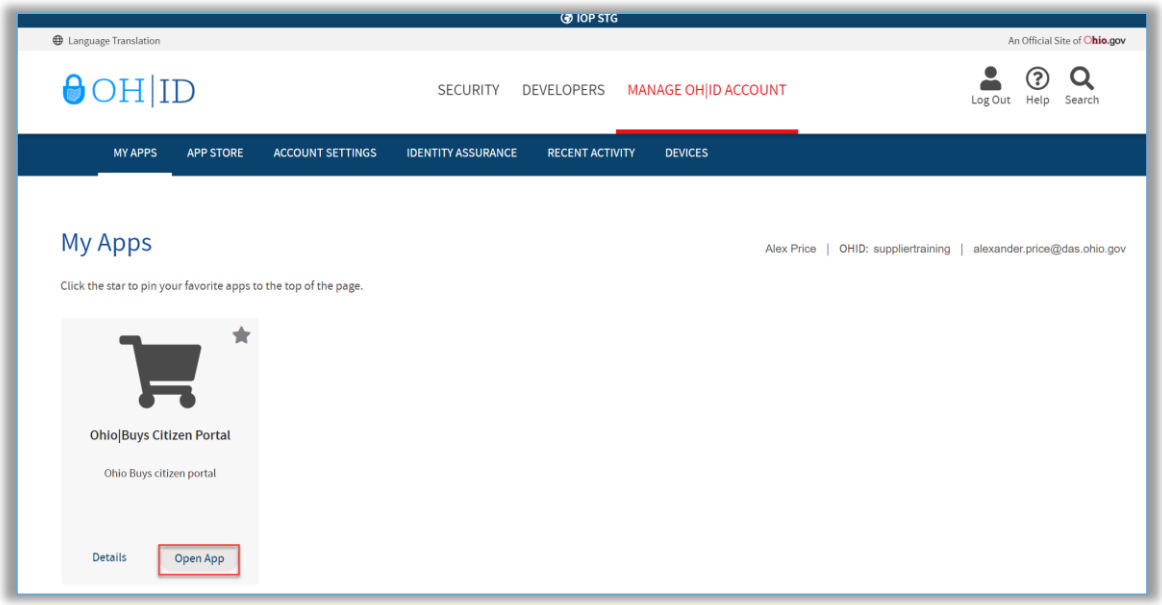
Click **Continue.** Enter your OH|ID credentials and click **Log In.**

Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

10

Once your OH|ID is created, you will be routed to https://ohid.ohio.gov. From this page, find the **OhioBuys Citizen Portal** tile and click **Open App.**

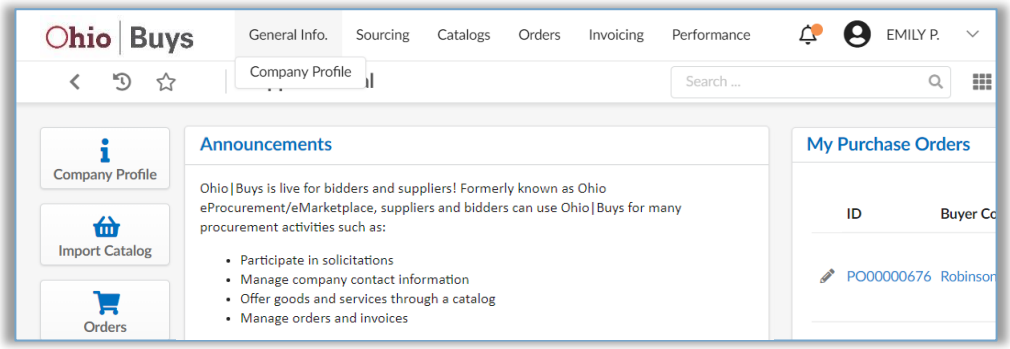
- If you do not see the OhioBuys Citizen Portal tile, click on the **App Store** header, search for "OhioBuys", and then click **Request Access.** You will receive an email notification when access has been granted and then will see the OhioBuys Citizen Portal tile under My Apps.
- If you see the Bidder Registration Request form after clicking Open App, your OH|ID has not been added as a Supplier Contact to any active Supplier accounts. If you need access to an active Supplier account, please reach out to your organization's Account Administrator to be added or email the helpdesk for assistance (*OBM.SharedServices@OBM.ohio.gov).*
- When working in Ohio Buys, please ensure you have only one window of Ohio Buys open at a time. Multiple windows can create errors such as a time-out or data not saved errors. If a user is logged out of one browser/window/tab, they will be logged out of all OhioBuys sessions.When this occurs, the user must close all open windows/tabs in all browsers. Next, they should clear their cache/history (also noted as clear browsing data) and open a single browser window for OhioBuys. These steps should prevent the error from occurring during their session.



Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

11

You will be navigated to the OhioBuys homepage. For details navigating OhioBuys and managing your contacts and profile, please refer to General Navigation, Managing Contacts and Selecting Commodities in this guide for details.



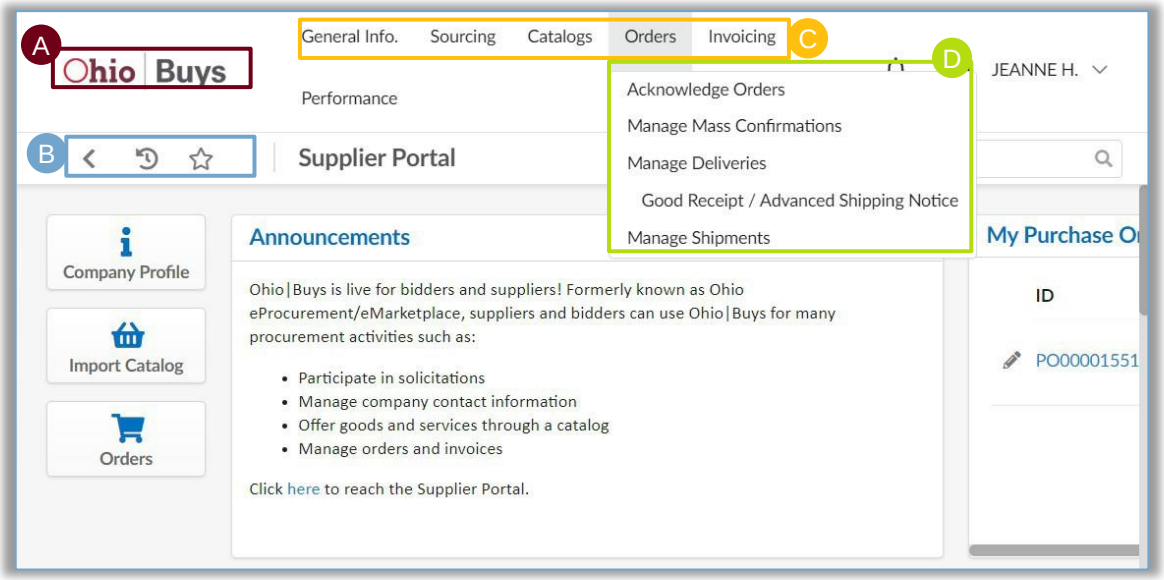
GENERAL NAVIGATION

Overview:

- What's Covered: Explains the structure and content of OhioBuys.
- When to Reference This Section: To become familiar with navigating OhioBuys.

Supplier General Navigation

Overview of Navigation Options (1/3)



A

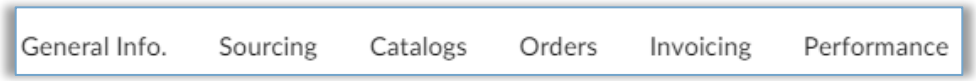
Clicking on the **OhioBuys** logo at any time will take you back to the homepage.

B

Using the **Navigational Icons** will take you back a page ( ), let you view your history ( ), or save the current page as a favorite ( ).

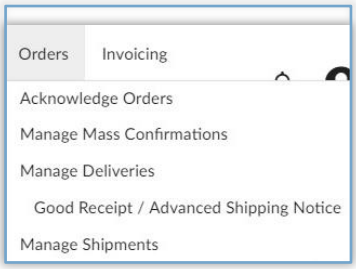
C

The **Main Menu Navigation Bar** at the top of the page includes options available and applicable to you. Click on a main menu option (e.g., General Info., Sourcing, Catalogs, Orders, Invoicing, Performance) to display its associated drop-down menu.



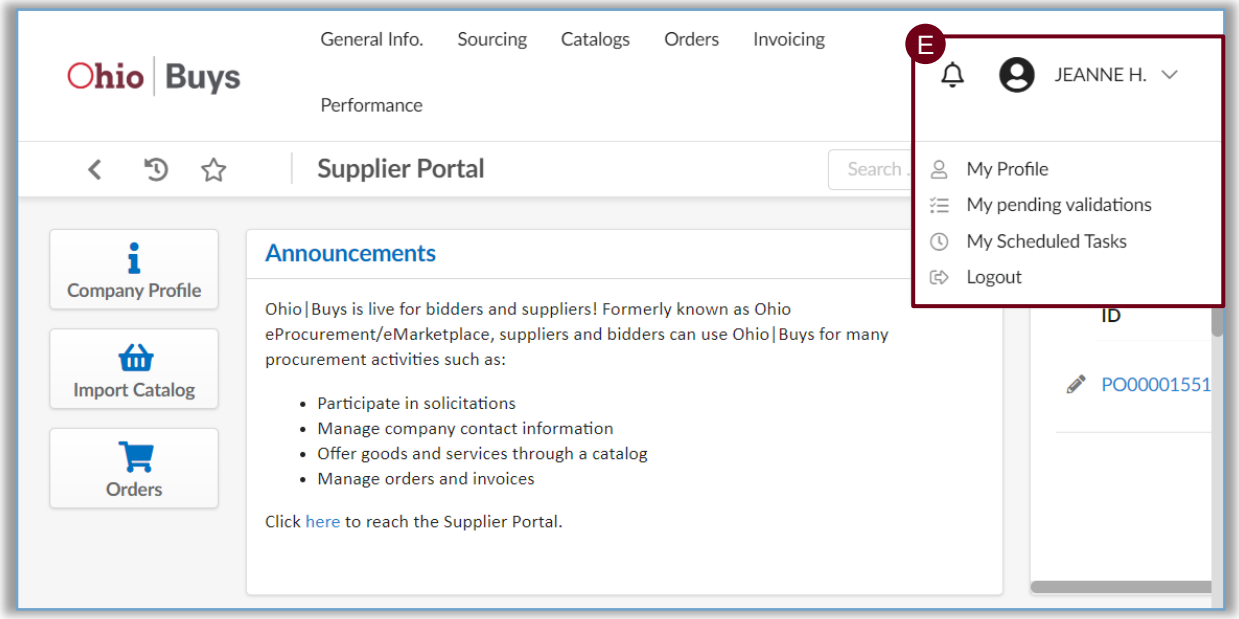
D

Selecting any option within a **Drop-Down Menu** will navigate you to the corresponding page.



Supplier General Navigation

Overview of Navigation Options (2/3)

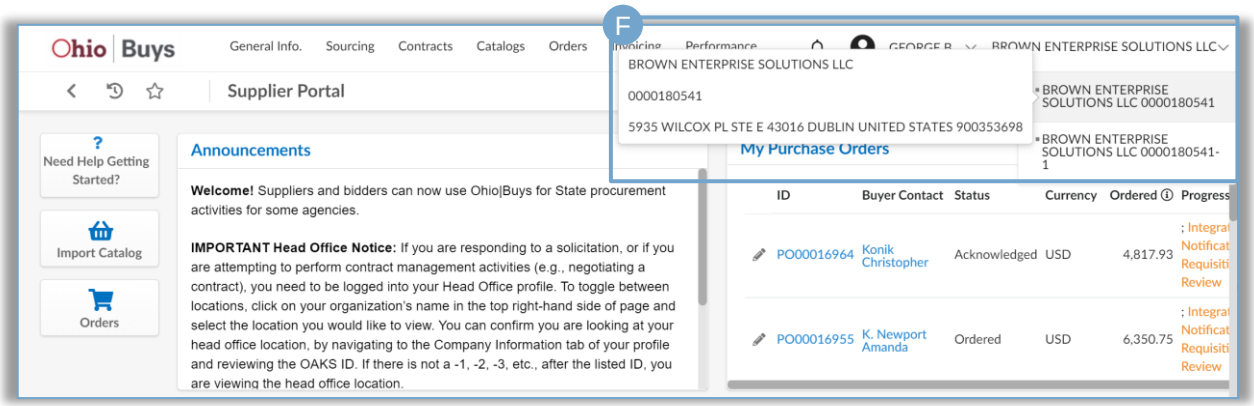


E

Clicking on your **User Name** displays the following options:

- **My Profile**: Displays your account profile, and enables you to update your personal information default settings and preferences.
- **My pending validations**: Contains anything assigned to you for action, such as acknowledging orders. In addition, you will receive an email whenever you have been invited to participate in a solicitation or have received a new order.
- **My Scheduled Tasks**: Displays open scheduled tasks assigned to you, such as tasks from an improvement plan.
- **Logout**: It is recommended that you do not use the Logout option to log out of OhioBuys. If you would like to log out, close your browser window. In addition, you will also be logged out after 30 minutes of inactivity.

Overview of Navigation Options (3/3)



F

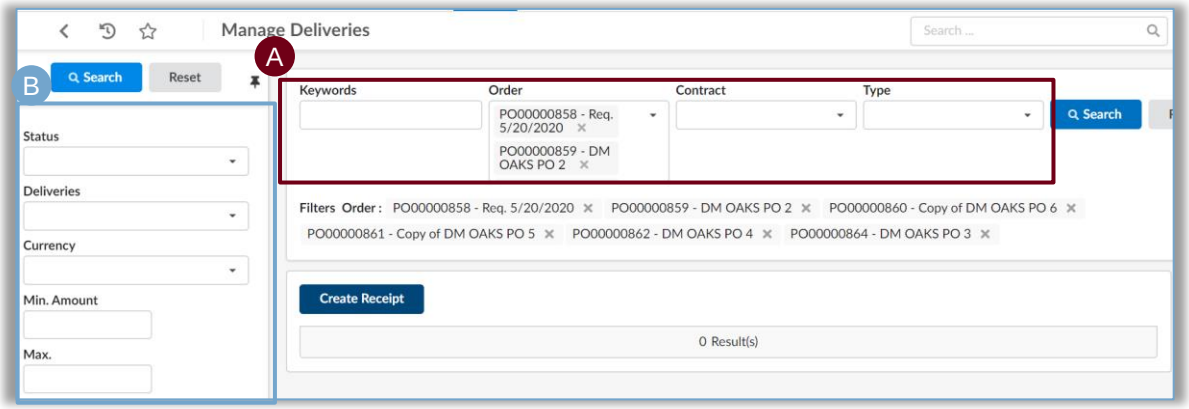
If you are a listed as a contact for multiple Supplier locations, you will see a drop-down menu next to your organization's name which will allow you to toggle between the various company locations with which you are associated.

- ⚠ If you are responding to a solicitation, or if you are attempting to perform contract management activities (e.g., negotiating a contract), you need to be logged into your Head Office profile.

To toggle between your company's locations, click on your organization's name in the top right hand side of page and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within OhioPays: https://ohiopays.ohio.gov/.

Please note, contacts, orders, and solicitations are managed at the location level, not the Supplier level, so it is recommended you routinely verify activity in all of the locations to which you have access.

Overview of Search Functionality



A

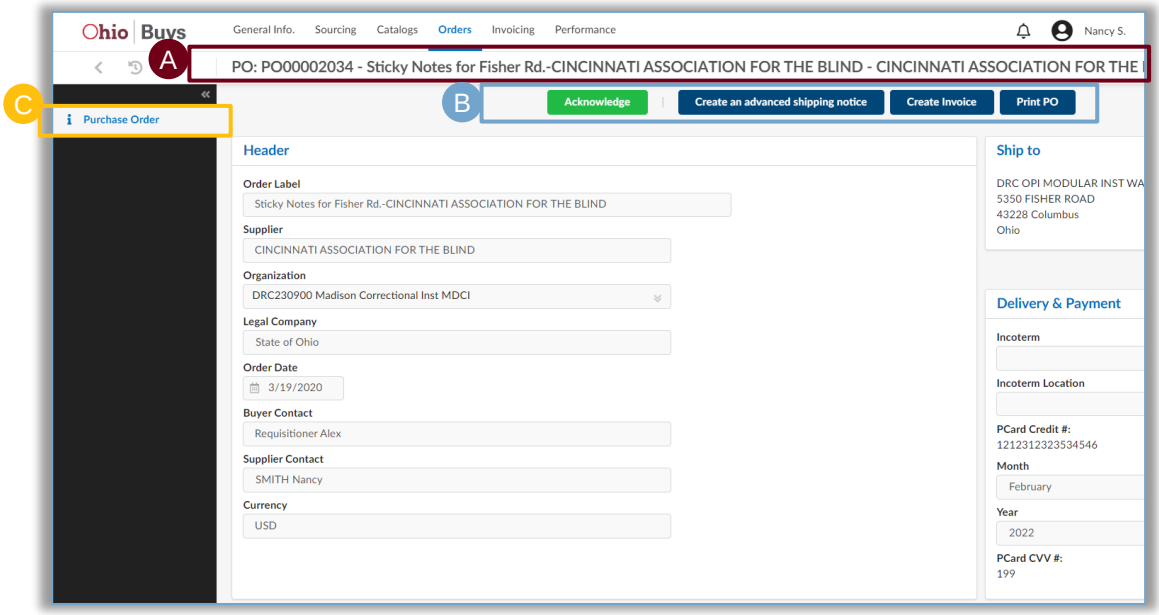
- Users can search for documents on any of the *Browse* pages.
- When searching within OhioBuys, you will be able to search for multiple values at once. For example, searching for more than one order at a time.

B

- The advanced search pane that is indicated by the funnel ( ) icon allows the user to search based on additional criteria related to the document.

Supplier General Navigation

Page Navigation Overview: Purchase Order Example

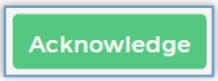


A

The Page Name is the name of the page you are on and it is displayed in the top left corner of the page.

B

The wording of **Action Buttons** will vary by user role and the task being completed, and are sometimes unavailable to certain users on specific pages. Use these buttons to take action on a particular task:



- *Green Buttons*: Submitting an action.
- *Red Buttons*: Canceling or rejecting an action.
- *Light Blue Buttons*: Saving an action.
- *Dark Blue Buttons:* Performing an optional or additional action.

C

The **Functional Tabs** are located on the left side of a page. Major tasks are organized by functional tabs. Clicking on these enable you to see additional information related to a specific task (e.g. Purchase Order).

You have now completed the guide for this section. Now that you are familiar with navigating with navigating OhioBuys, refer to the Managing Contacts section of this guide.

MANAGING CONTACTS

Overview:

- What's Covered: Adding or deleting company contacts, as well as assigning each contact a role aligning to the actions that they will be taking in OhioBuys.
- When to Reference This Section: When you want to manage contacts for your company.

How to Manage Bidder and Supplier Contacts

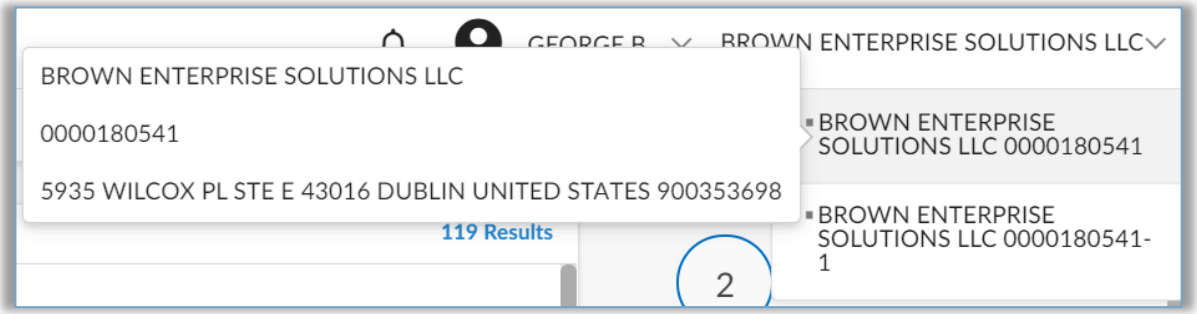
Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

- Your organizations should get their contacts registered as soon as possible and each contact should verify their access OhioBuys access. Registering an OhioBuys account and subsequent contacts for your organization will ensure your company has access to, is familiar with, and is readily prepared to bid within OhioBuys when the time comes.

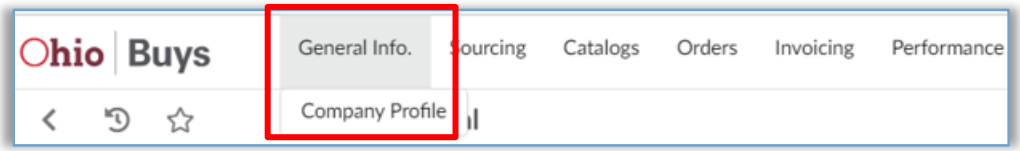
- Please note, contacts are managed at the location (i.e., address) level, not the Supplier level. This means that a contact needs to be associated with each location in order to access information and perform actions for that location. If you add or remove a contact for a particular location and would also like to make this change at another location, go to the Company Profile for the other location and repeat the steps contained in this guide.

When adding contacts, please start with adding them to your head office location as these are the contacts that can be invited to solicitations. To toggle between your company's locations, click on your organization's name in the top right hand side of page and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within OhioPays: https://ohiopays.ohio.gov/.

1



Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



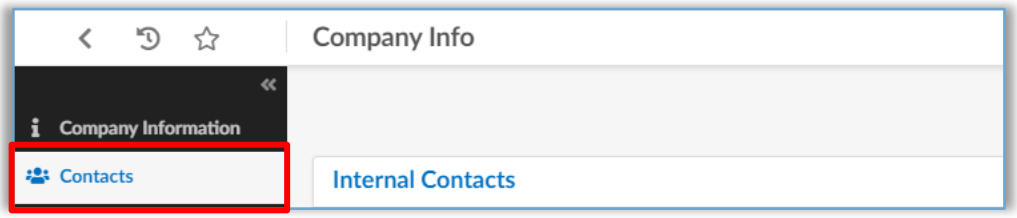
Navigate to the **Company Information** tab where your company's information is displayed.

- On the right side of the page, you can see the address associated with the location you are viewing. To view a different location, click on your organization's name in the upper right-hand corner of the screen and select an option from the displayed drop-down menu

Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

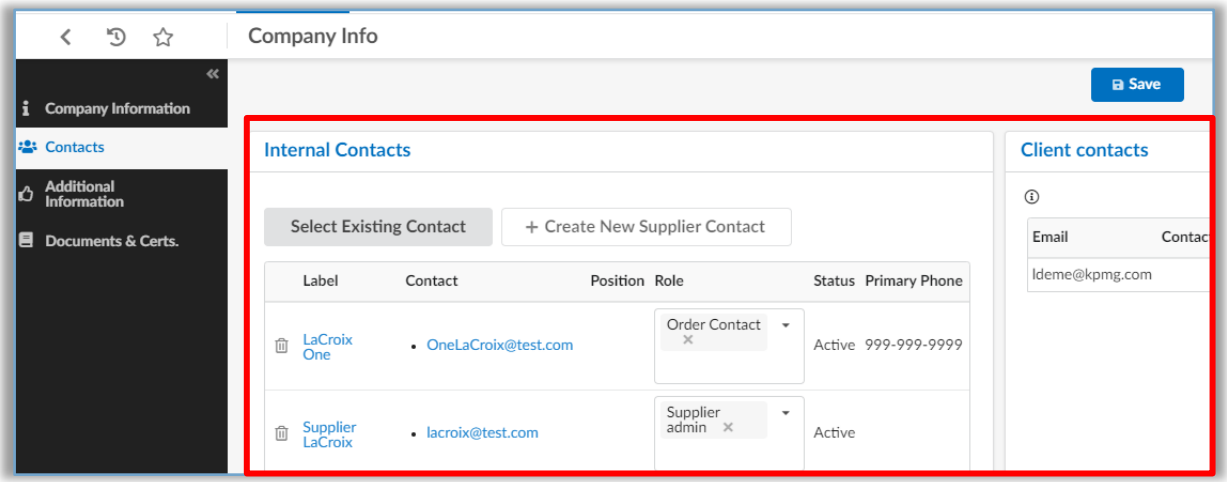
2

Navigate to the **Contacts** tab.



3

From the Contacts page, you are able to revise (i.e., add, edit, or delete) contacts for your company (from the box titled Internal Contacts) and review contacts for the State of Ohio (from the box titled Client Contacts).



- ▲ Users should contact their Supplier Admin if they feel that roles or locations are missing.
- ▲ Contact information should be kept up to date with the most accurate data at all times. Please ensure all internal contacts listed on the supplier record are current and remove/update any outdated, obsolete, or erroneous information.

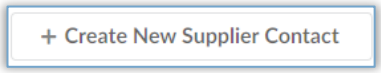
Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

4

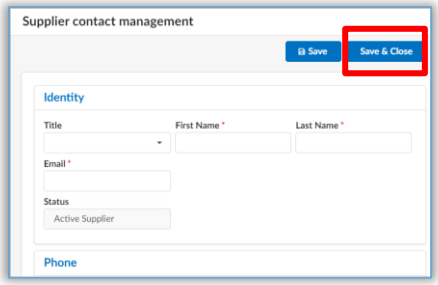
While on the Contacts tab, navigate to the box titled Internal Contacts to complete the following contact management options for your company:

a) Add a New Company Contact

1) Toward the top of the Internal Contacts box, click the **Create New Supplier Contact** button to add a new company contact.



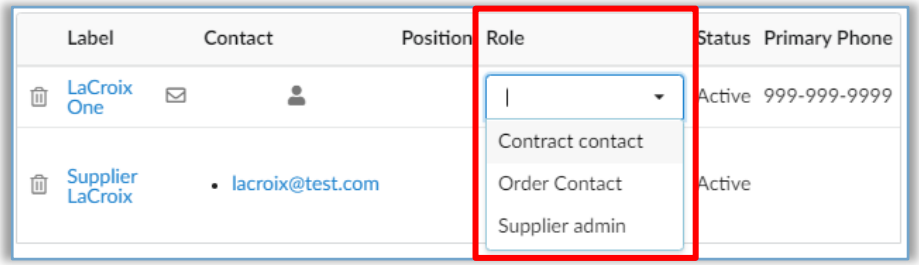
2) Within the pop-up titled Supplier Contact Management, complete the mandatory and (if applicable) optional information in the Identity box (e.g., last name, first name, email, phone) and the Address box.



3) Click the **Save & Close** button.

4) Although you have added a company contact, they must have an OH|ID in order to access OhioBuys. In addition, the email address entered for the new contact must match the email address the contact used to set up their OH|ID.
   - ▲ OH|IDs can created by navigating to https://supplier.ohio.gov and clicking **Sign Up.**

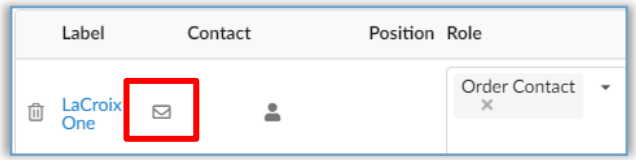
5) Click the **Role** field and select a role or roles from the drop-down list. If contacts are not assigned a profile, they will not be able to take actions in the system (e.g., review and acknowledge orders, respond to quick quotes, etc.).
   - ▲ Assign the **Contract Contact** role to any user who will need to be notified about a solicitation or responsible for a contract. In order for the State to notify them through OhioBuys, the user must have this role.
   - ▲ Assign the **Order Contact** role to any user who will be responsible for reviewing and acknowledging purchase orders.
   - ▲ Assign the **Supplier Admin** role to any user who will be responsible for managing contact and company profile information.
   - ▲ Assign the **Revenue Share** role to any user who will be responsible for reviewing and reporting revenue share information for a contract.



4

6) Click **Save**.

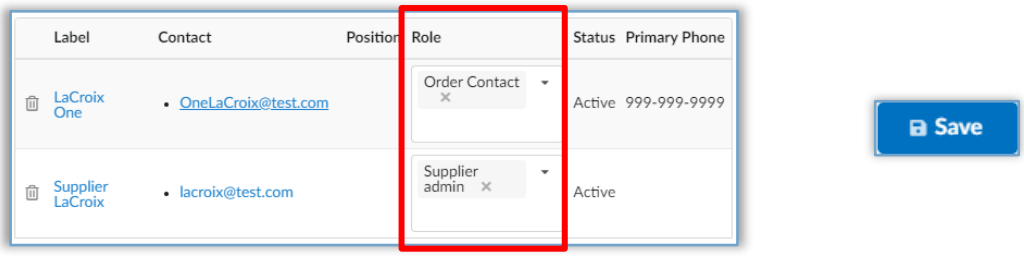
7) Click the **Mail** icon to send the user an invitation to log in. The user who has been added as a contact must then create an OH|ID with the email address that was entered in OhioBuys.



▲ Once you have added a contact to a particular location, you can add that contact to another location by toggling over to the desired location, navigating to the Contacts tab of your company profile, and clicking the Select Existing Contact button.

b) <u>Change a User Role</u> :

- To change a user's role, navigate to the column for **Role**, click the drop-down menu, and select the applicable role(s). The available roles are Supplier Admin, Order Contact, and Contract Contact. After you have made the necessary updates, click **Save.**



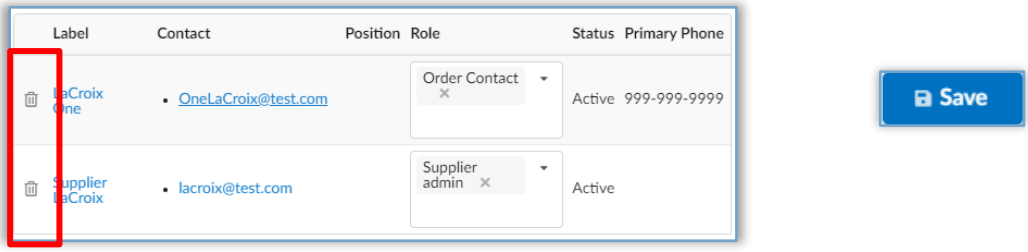
▲ You should assign users the Order Contact role if they are responsible for order processing. Users assigned this role will be shown to State buyers as Supplier contacts when they are submitting orders.

▲ It is also recommended that each company's account have at least two Supplier Admins. Supplier Admins have the ability to manage contact and company profile information (e.g. select commodities which they can provide) in OhioBuys.

Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

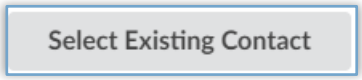
4

b) Remove a Company Contact: Find the company contact you want to remove and click on the **Trash Can** (🗑) icon next to their name. Once completed, click **Save**.

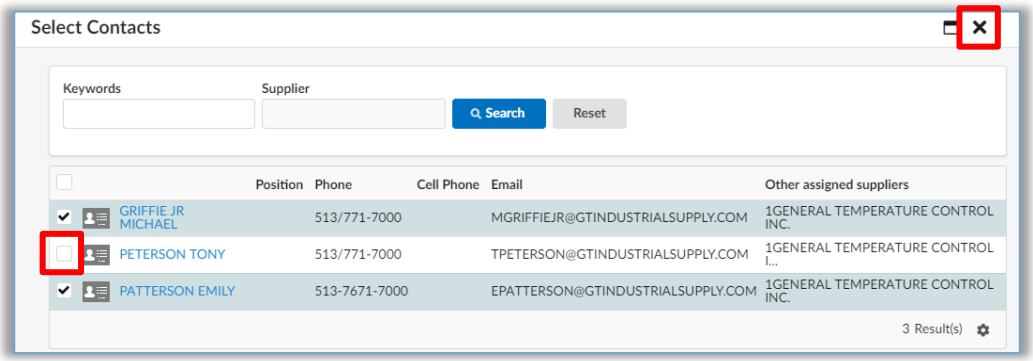


c) Add an Existing Company Contact In OhioBuys:

1) Toward the top of the Internal Contacts box, click the **Select Existing Contact** button to find and add a company contact that is already listed as a contact for another location.



2) Within the pop-up titled Select Contacts, either utilize the search functionalities toward the top or scroll through the automatically generated list of company contacts associated with your company. Once you find the company contact you want to add, click the **Checkbox** (☐) icon next to the individual's name.



3) Once you have clicked the Checkbox icon next to each company contact you want to add, navigate to the top of the pop-up and click the **Close (✕)** icon. The contact is now listed within the Internal Contacts box on the Contacts page. Once the contact has been added, select the applicable role(s) for the contact and click **Save**.

You have now completed the guide for this section. For next steps in managing your company profile please refer to the Selecting Commodities section in this guide.

SELECTING COMMODITIES, COUNTIES SERVED, AND PROVIDING SUPPLIER DEMOGRAPHICS

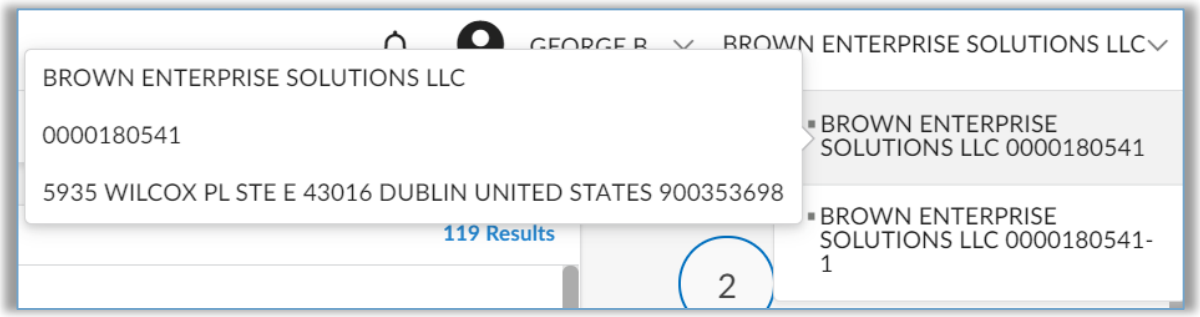
Overview:

- What's Covered: Adding or deleting the commodities which your company can supply.
- When to Reference This Section: When you want to update the list of commodities your company can supply. Selecting commodities in OhioBuys allows your company to receive automated notifications for relevant solicitations.

How to Select Commodities

Step-by-Step Instructions for Selecting Commodities as a Bidder/Supplier

- Please note, commodities are managed at the location (i.e., address) level, not the Supplier level. When managing commodities, please add them to your head office location as this is the location that is invited to solicitations. To toggle between locations, click on your organization's name in the top right hand side of page and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within OhioPays: https://ohiopays.ohio.gov/.

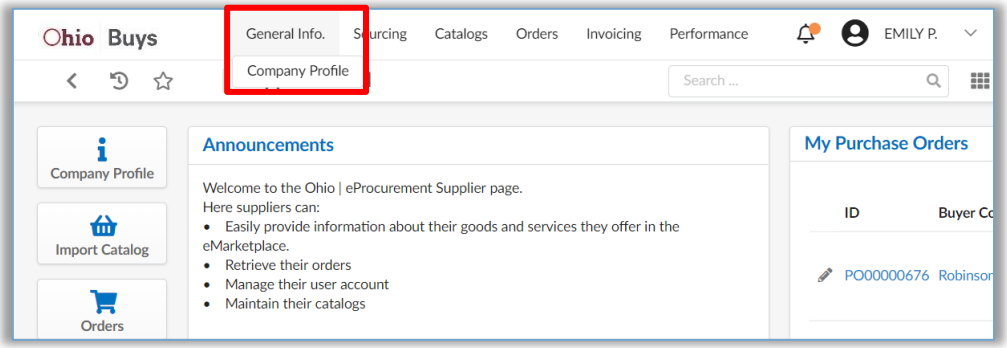


How to Select Commodities

Step-by-Step Instructions for Selecting Commodities as a Bidder/Supplier

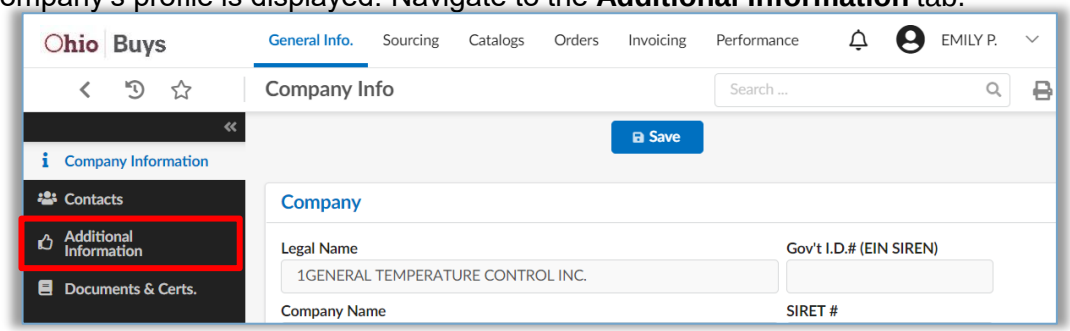
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



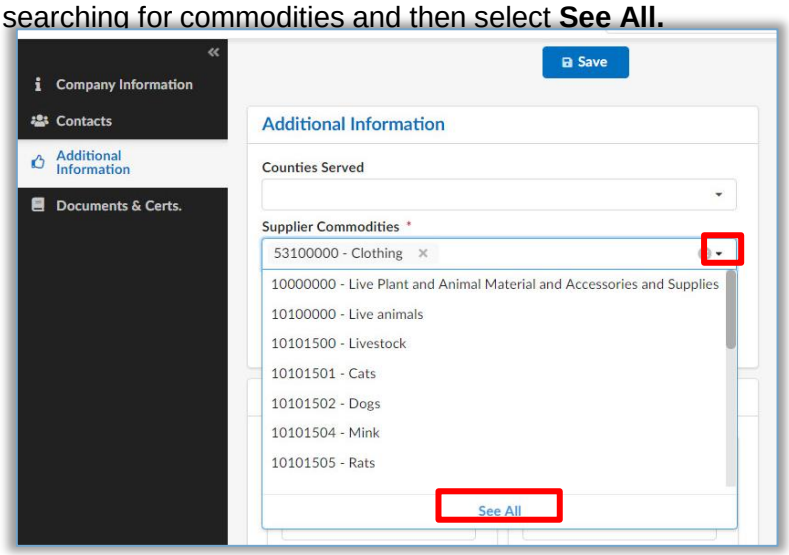
2

Your company's profile is displayed. Navigate to the **Additional Information** tab.



3

On this tab, you can update the commodities your organization offers. Click the **Selector (▾)** icon to begin searching for commodities and then select **See All.**

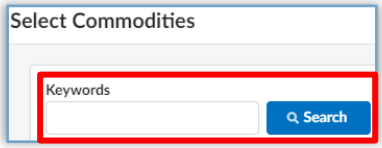


How to Select Commodities

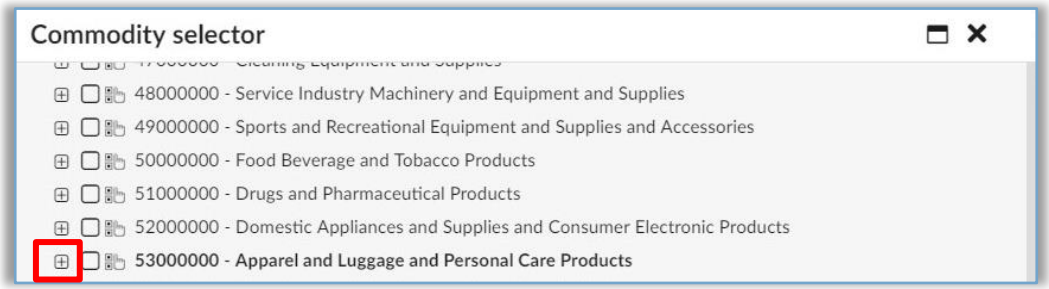
Step-by-Step Instructions for Selecting Commodities as a Bidder/Supplier

4

You are able to enter search terms in the **Keywords** field and then click **Search.**



Relevant search results will be highlighted. Once you find a commodity category you would like to view in more detail, click the **Plus** icon.



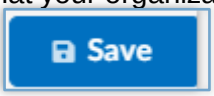
5

If your organization offers all the commodities listed underneath the category, click the **Hand ( )** icon to select all of the commodities in the category. If you would only like to select a few of the commodities, click the **Checkbox ( )** icon for the commodities your organization offers. Once you have selected commodities, close the pop-up window.

▲ If you are having trouble finding the correct commodity in OhioBuys, you can also visit the UNSPSC website (https://www.unspsc.org/search-code) to search for a commodity. Once you have located the commodity on this site, enter the commodity code in the OhioBuys **Keywords** field and then **Search** and select it from the results.

6

Click **Save** to save the updates to your company profile. Please note, selecting applicable commodities allows the State of Ohio to easily identify relevant Bidders and Suppliers for solicitations, so it is recommended that your organization maintains accurate selections.

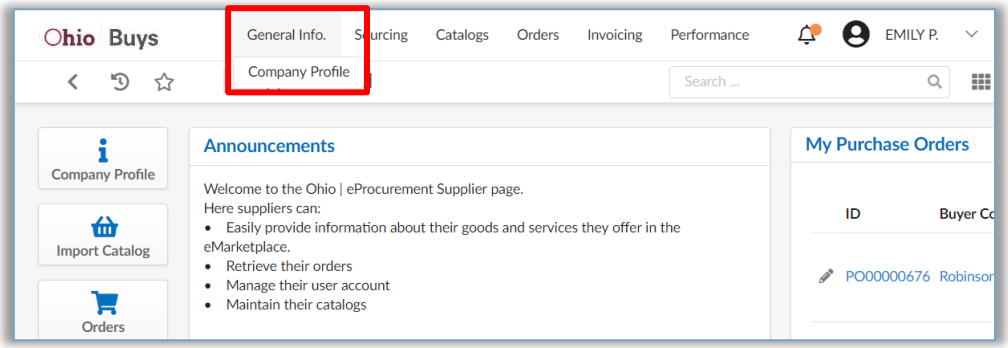


How to Select Counties Served

Step-by-Step Instructions for Selecting Counties Served as a Bidder/Supplier

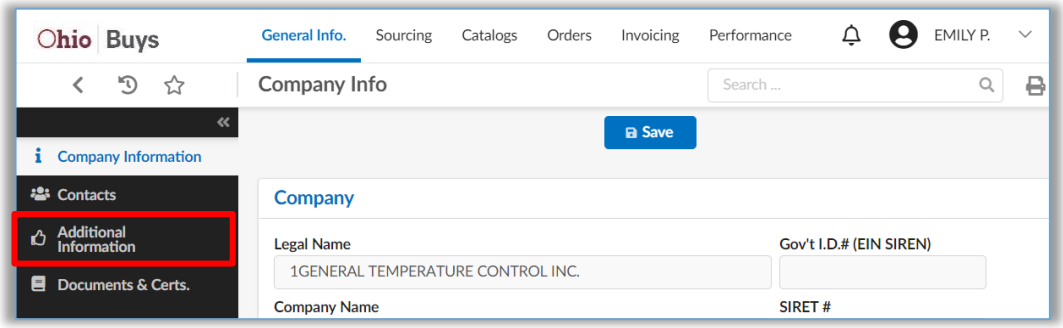
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



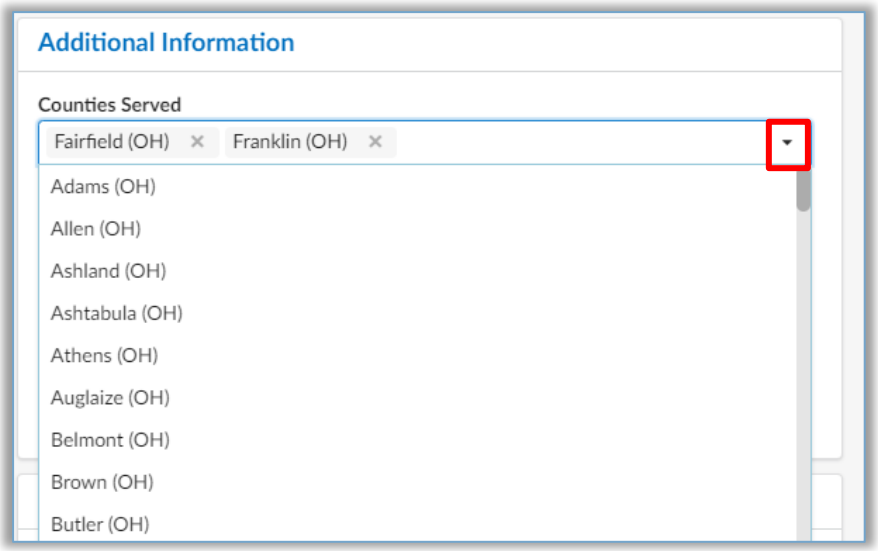
2

Your company's profile is displayed. Navigate to the **Additional Information** tab.



3

On this tab, you can update the counties that your organization serves. Click the **Selector (▾)** icon to begin searching for counties. Type in the name of a county that your organization serves and select them when they appear. Repeat this process for any additional counties.



Step-by-Step Instructions for Selecting Counties Served as a Bidder/Supplier

4

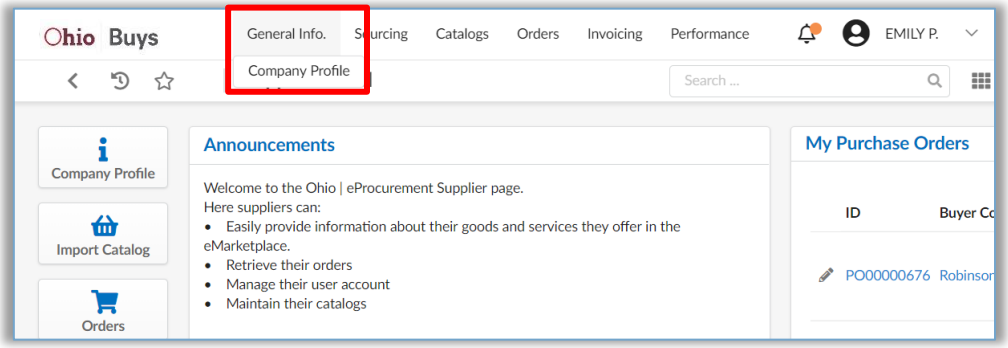
Click **Save** to save the updates to your company profile. Please note, selecting applicable counties served allows the State of Ohio to easily identify relevant Bidders and Suppliers for solicitations, so it is recommended that your organization maintains accurate selections.

How to Provide Supplier Demographics

Step-by-Step Instructions for Providing Demographics as a Bidder/Supplier

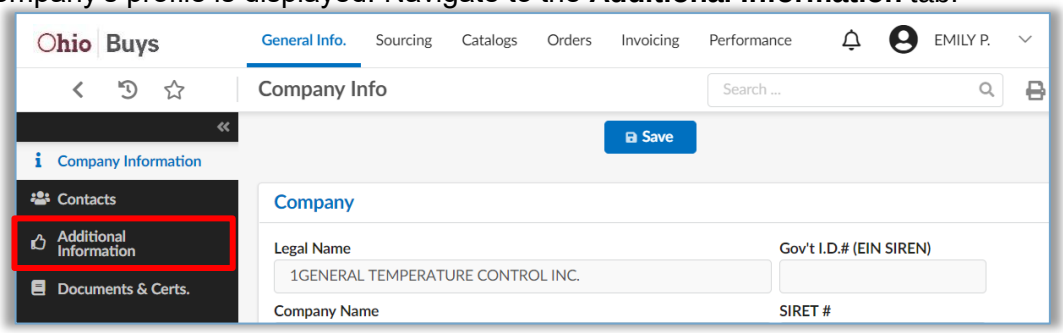
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



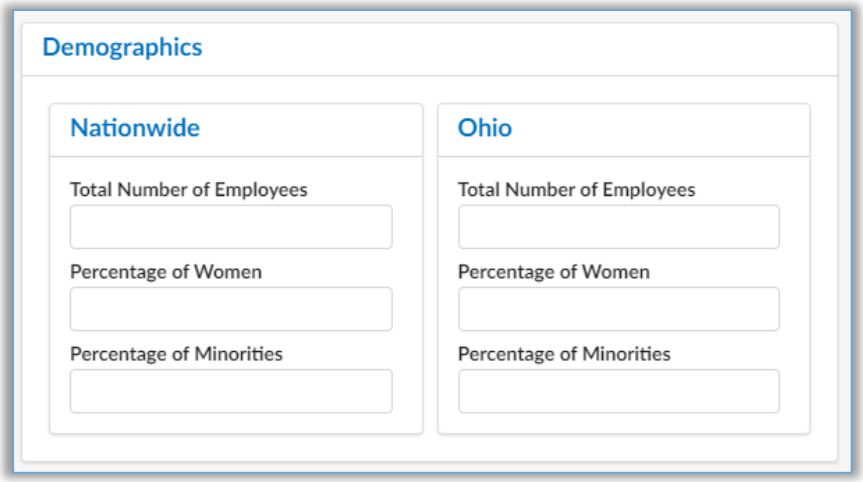
2

Your company's profile is displayed. Navigate to the **Additional Information** tab.



3

On this tab, under the Demographics section you can add the Nationwide and state of Ohio demographic breakdown for your organization. Click **Save** once finished.



You have now completed the guide for this section. For next steps in managing your company profile please refer to the Uploading Documents section in this guide.

UPLOADING DOCUMENTS

Overview:

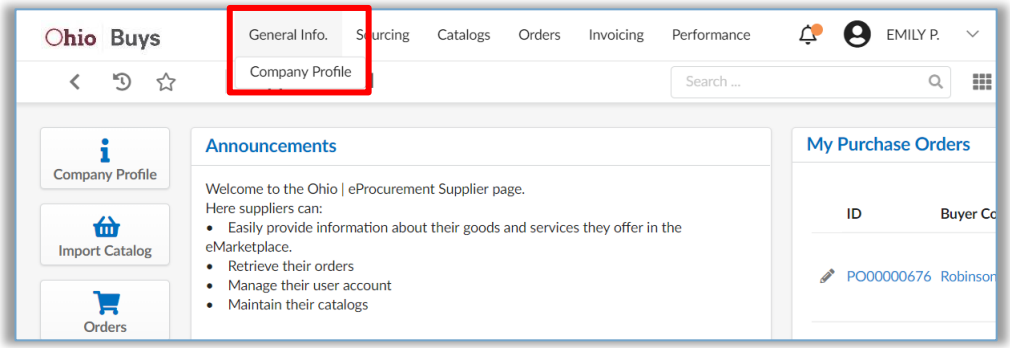
- What's Covered: Uploading documents and certifications to your Company Profile
- When to Reference This Section: When you would like upload legal documents, licenses and, and/or other documents (e.g., Insurance, Workers Comp, Affirmative Action Plans, etc.) to your Company Profile in OhioBuys.

How to Upload Documents and Certifications

Step-by-Step Instructions for Uploading Documents and Certifications

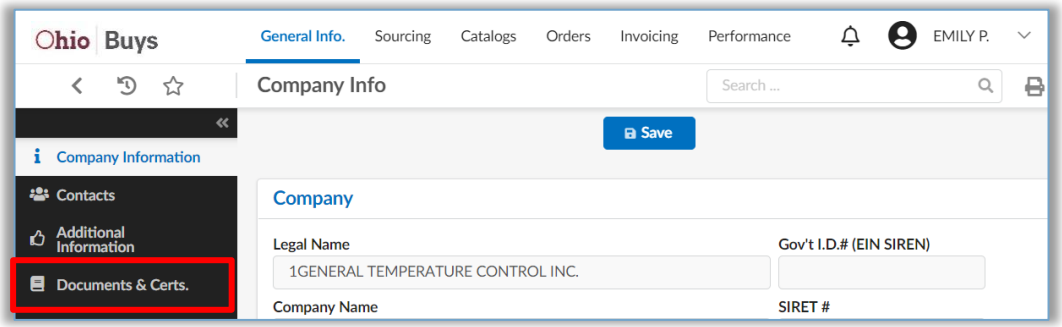
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



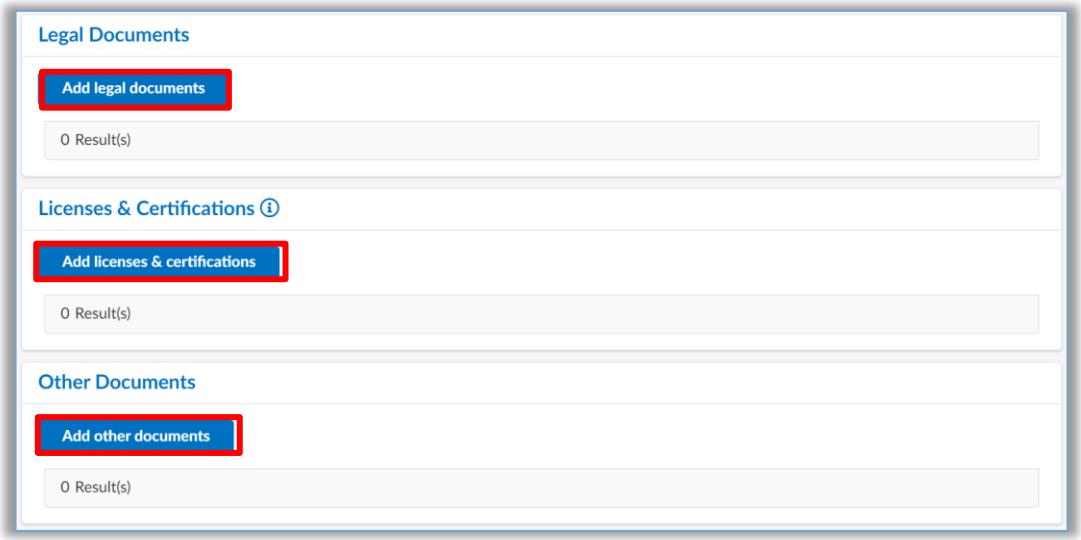
2

Your company's profile is displayed. Navigate to the **Documents & Certs.** tab.



3

On this tab, you can upload legal documents, licenses and certifications, and/or other documents (e.g., Insurance, Workers Comp, Affirmative Action Plans, etc). Depending on the type of document you wish to upload, click **Add legal documents, Add licenses & certifications,** or **Add other documents.**



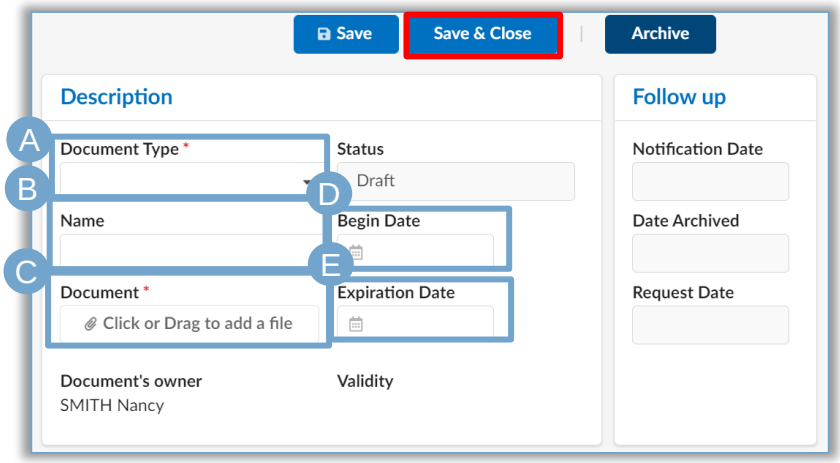
Step-by-Step Instructions for Uploading Documents and Certifications

4

Complete the following fields:

a) Document Type (e.g., Affirmation Action Program Verification, Certificate of Insurance, etc.)
b) Name (a summary of what the document is)
c) Document (click the **Click or Drag to add a file** button to search for and select the document you would like to upload)
d) Begin Date (the starting date the document is valid)
e) Expiration Date (the expiration date for the document)

After these fields have been populated, click **Save & Close.**



5

The document has been added to your Company Profile. Continue to add documents as needed.

▲ You will receive email notifications 60 days prior to the expiration date of any documents you upload.

You have now completed the guide for this section. For details on how to submit Bidder change requests to update your address or add MBDD statuses, please refer to the Submitting Bidder Change Requests section in this guide.

SUBMITTING BIDDER CHANGE REQUESTS

Overview:

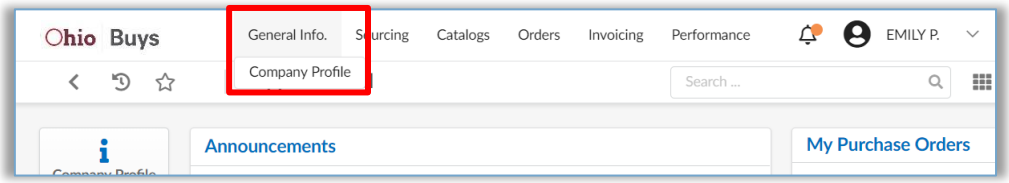
- What's Covered: Creating and submitting Bidder change requests
- When to Reference This Section: When you are a new Bidder (i.e., not an existing Supplier) and you would like to update your company information (e.g., add MBDD statuses, change your address, etc.)

How to Submit Bidder Change Requests

Step-by-Step Instructions for Submitting Bidder Change Requests

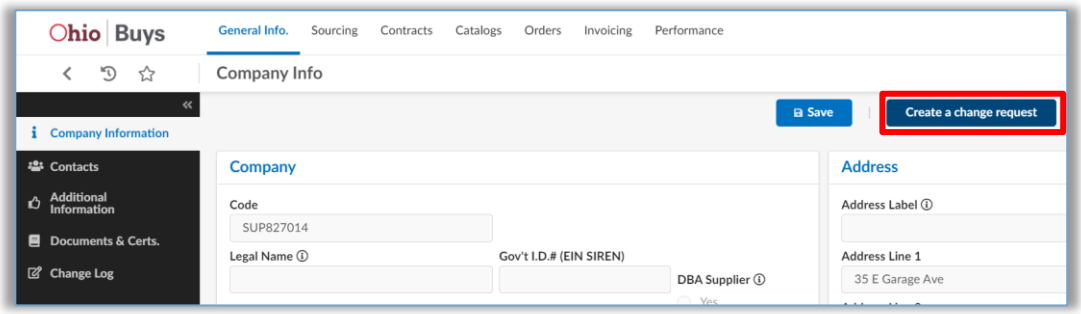
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



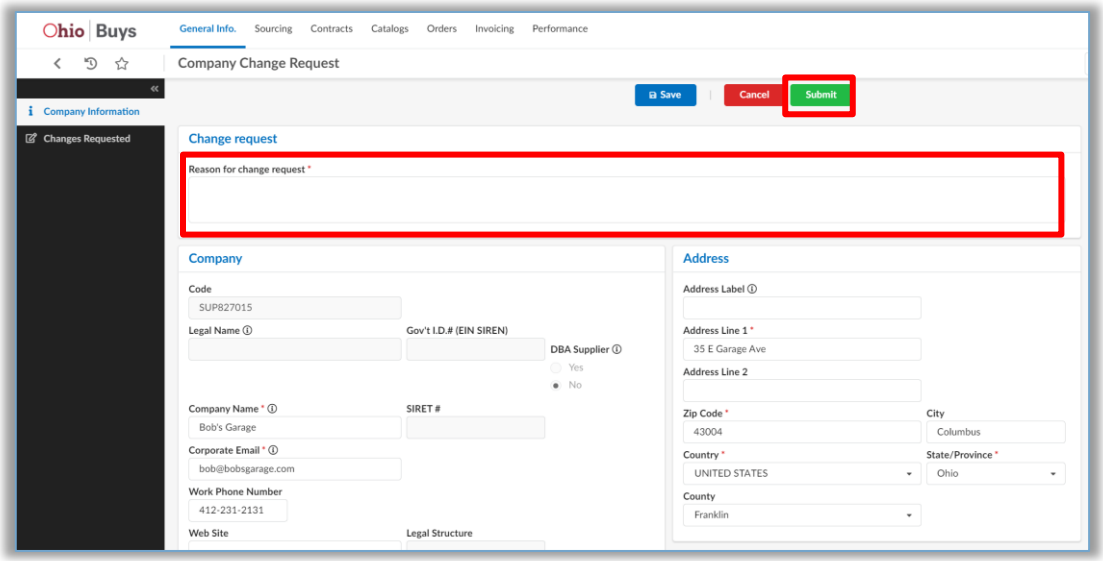
2

Your company's profile is displayed. Click **Create a change request.**



3

Enter the **Reason for change request** and make any requested updates (e.g., update your Address, add MBDD statuses, etc.). After you have made your requested updates, click **Submit.** You will receive email notifications as your change request is reviewed and approved by the State.



You have now completed the guide for this section. For additional OhioBuys training resources and support, please refer to the Accessing Additional Training Resources and Support section in this guide.

ACCESSING ADDITIONAL TRAINING RESOURCES AND SUPPORT

Overview:

- What's Covered: Instructions for accessing additional OhioBuys training materials and support.
- When to Reference This Section: When you need additional information or support.

How to Access Additional Training Resources and Support

Step-by-Step Instructions for Accessing Additional Training Resources and Support

Suppliers and Bidders are strongly urged to complete training to begin successfully working in OhioBuys.Training beyond this guide includes step-by-step navigational videos and job aids. The training videos and job aids are available on the OhioBuys website.

Videos:

Link to Video	Description of Content
Accessing and Navigating OhioBuys for Existing Suppliers	Instructions on how to access OhioBuys as an existing supplier and manage your company's profile.
Accessing and Navigating OhioBuys for New Bidders	Instructions on how to access OhioBuys as a new bidder and manage your company's profile.
Viewing and Responding to Solicitations	Instructions on how new bidders and existing suppliers can view and respond to State solicitations in OhioBuys.
Reviewing and Acknowledging Purchase Orders	Instructions on how to review purchase orders within OhioBuys, as well as how to send acknowledgement to the State on your intent to fulfill them.
Managing Advanced Shipping Notices and Returns	Instructions on how suppliers can send advanced shipping notices (ASNs) in OhioBuys to notify State buyers of a pending delivery of goods. This video also provides instructions on how suppliers can manage returns in OhioBuys.
Reviewing Exceptions and Updating Improvement Plans	Provides an overview of the State's new tools to evaluate supplier performance, document issues, and drive improvement.

You have now completed the guide for this section. For additional support, please contact our Ohio Shared Services Team at OBM.SharedServices@OBM.Ohio.Gov or 877-644-6771

Training Videos

Job Aids

Help Desk Support

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0	4/24/20	Initial draft	ALL
1.1	5/27/20	Updates around search functionality using multi-selector fields	19
1.2	6/8/20	Updates to Supplier view when selecting multiple locations	18, 22
1.3	6/23/20	Added revised OhioBuys landing page	6,11
1.4	7/10/20	Added phone number extension field	26
2.2	2/19/21	Updated OH|ID screens, noted mandatory fields on Bidder Registration Form, Added additional contacts clarification, Added Uploading Documents section	7-17, 24, 32-34
2.3	3/1/21	Added a note referencing that OAKS will be importing UNUSPSC codes into OhioBuys	7, 30
2.4	3/15/21	Added WBE status option. Added new OhioBuys homepage screenshots	1, 8, 11
3.0	4/8/21	Added details on Bidder change requests	36, 37
3.1	5/10/21	Removed expired Job Aid links	40
3.4	6/7/21	Added additional role clarification information	26, 27

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
3.5	7/8/21	Added details on how to easily see a location's OAKS ID	21, 27, 28
3.6	7/19/21	Added a note at the beginning of the Managing Contacts section. Also correct the typo at the end of Page 24	24, 25
3.7	9/20/21	Updated all supplier URLs and updated the OH|ID login screens	6, 7, 8, 11, 12
3.8	10/4/21	Updated OhioBuys logos and wording	All
3.9	11/4/21	Updated new OHID account creation steps	7,8,12,13-17
4.0	1/20/2022	Minor language updates	17
4.1	3/15/22	Inform suppliers to keep the contacts information current and not to have erroneous or obsolete data there.	26
4.2	5/19/2022	Replaced mentions and screenshots of EOD with MBDD	10, 11, 36, 37, 38
~~4.3~~	~~7/14/2022~~	~~Added note for Suppliers using their SSN as their TIN.~~	~~10~~
4.4	7/26/2022	Updated OH|ID Logins screenshot	13
4.5	8/22/2022	Restored note for Suppliers using their SSN as their TIN.	10
4.6	11/14/022	Updated Supplier Portal references to OhioPays.	21, 25, 31

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
4.7	12/7/22	Added details on how to add supplier demographics	2, 32 - 36
4.8	01/17/23	Added a note regarding multiple Ohio Buys windows and errors that can come as a result	17
4.9	04/12/23	Noted Suppliers are logged off automatically after 30 minutes	21