

Creating and Managing Purchase Requisitions in OhioBuys

For agency users responsible for creating, managing, and approving purchase requisitions in OhioBuys.

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v:9.0



Table of Contents

Introduction	3
1 Purchasing in OhioBuys	4
Updating a User Profile in OhioBuys	11
2 Submitting Purchase Requisitions	15
Adding Hosted Catalog Items to your Shopping Cart	16
Adding Punchout Catalog Items to your Shopping Cart	21
Adding Freeform Items to your Shopping Cart	26
Completing Checkout for Purchase Requisitions	32
Submitting a Pcard Purchase	42
Completing Chartfield Information	51
Creating a PAY01 Purchase Requisition	57
3 Additional Purchasing Notes	60
4 Approving Purchase Requisitions	60
Reviewing and Updating a Purchase Requisition	63
Requester Supervisor - Approving a Purchase Requisition	73
Additional Agency Approver - Approving a Purchase Requisition	77
Agency Procurement Approver - Approving a Purchase Requisition	81
Agency Fiscal Approver - Approving a Purchase Requisition	85
Agency Final Approver - Approving a Purchase Requisition	90
Reviewing Sourcing Details for a Purchase Requisition	93
5 Multiple Agency Approvers	98
6 Managing Purchase Requisitions	98
Forwarding a Purchase Requisition	99
Duplicating a Purchase	101
Cancelling a Purchase	103
Sending a Requisition Document for Signature Using OneSpan Sign	106
Using the Notification Bell and Messaging in OhioBuys	110

Introduction

Overview: This learner guide covers the core activities related to creating, reviewing, approving, and managing purchase requisitions in OhioBuys.

Processes Covered:

- 1. Accessing OhioBuys:** OhioBuys can be accessed by logging in to MyOhio with your OH|ID and password. Once logged in, users have a variety of tools available for navigation including quick-access icons and a powerful universal search feature.
- 2. Shopping:** OhioBuys contains a robust hosted catalog with items from a wide variety of Suppliers, as well as access to external punchout catalogs for some Suppliers. OhioBuys also allows users to add noncatalog, or freeform, line items to their shopping cart when required.
- 3. Submitting and Updating Purchase Requisitions:** After identifying the items needed, users must complete and submit a purchase requisition within OhioBuys. Certain items, quantities, and payment methods require users to complete different fields. Once submitted, users can monitor the progress of their purchase or cancel as needed.
- 4. Approving:** Most purchase requisitions will require approval from various agency approvers. Approvers will be responsible for reviewing different parts of the requisition, as their role requires. The system limits an approver's ability to edit depending on the role they have been granted.

Purchase Requisition Approval Path:

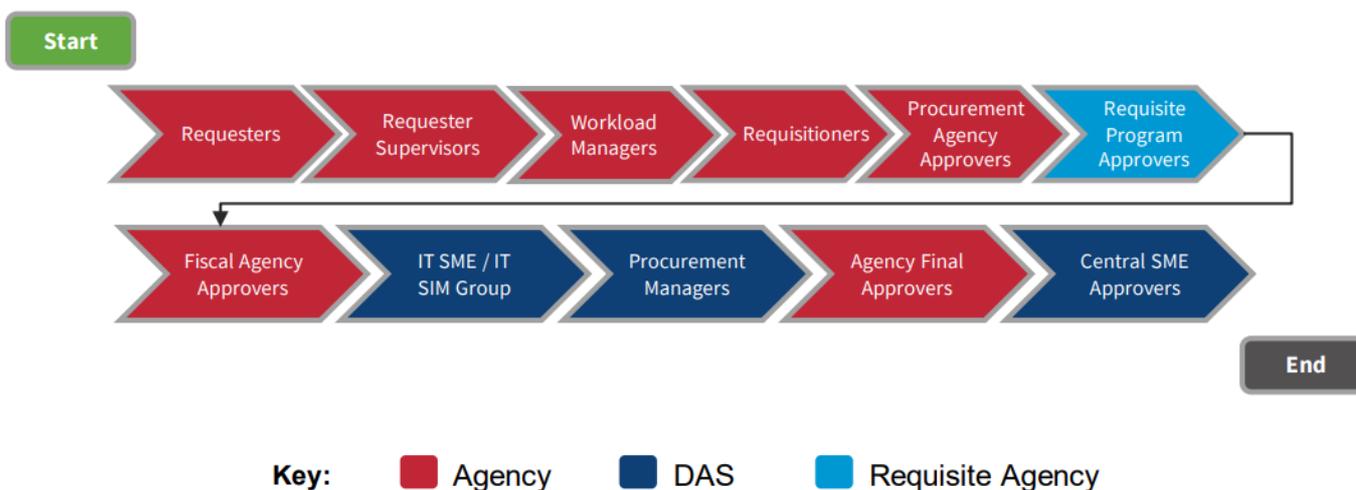
Approval Workflow

Most purchase requisitions in OhioBuys follow the approval workflow displayed at the bottom of this page. Once a purchase requisition has been submitted, it is automatically routed through the submitting user's unique agency approval path. At each step, the relevant approver examines the purchase requisition for compliance with agency, budgetary, or State policies, and approves or rejects the purchase requisition. Once a purchase requisition has received all the necessary approvals, a purchase order will be automatically created and an email notification will be sent to the Supplier.

Agency-Specific Variations

Each agency has the option to customize its agency approval workflow. Because of this, there may be variations to this process specific to your agency, such as including multiple approvers at a particular step. Agency approval rules are managed and maintained by Agency Administrators.

Approval Path



Purchasing in OhioBuys

Topics

- Purchase Requisition Item Types
- Starting the Purchase Requisition Process
- Purchasing Services in OhioBuys
- Capital Purchases in OhioBuys
- Updating a User Profile in OhioBuys

Purchase Requisition Item Types

There are three main categories of items that can be purchased within OhioBuys: Hosted Catalog Items, Punchout Catalog Items, and Freeform Items. How to purchase each type of item will be discussed in more detail later in this Learner Guide.

Hosted Catalog Items: Items that are hosted on catalogs within OhioBuys. The entire shopping process, from searching, to submitting, takes place in OhioBuys.



Punchout Catalog Items: Items that are hosted on a Supplier’s external Website. For punchout items, you will first identify the Supplier you wish to order from, and then “punch out” to their website to shop for the item(s) you need. After adding the item(s) to your cart, you will be returned to OhioBuys to complete the checkout process.



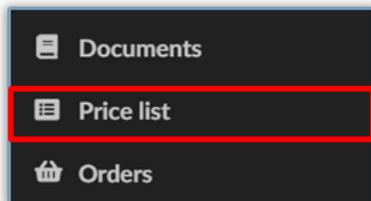
Freeform Items: Items that do not exist in either a hosted or a punchout catalog. Freeform line items are created by the Requester and should only be created if no suitable alternative for the item in the purchase requisition exists in either a hosted or punchout catalog.

Starting the Purchase Requisition Process

To understand what type of purchase requisition items (e.g., hosted catalog items, punchout catalog items, freeform items) you should add to your cart as part of the purchase requisition process, we recommend first reviewing the contract you are trying to purchase from. Reviewing a contract in OhioBuys will allow you to see how a contract’s catalog has been configured in OhioBuys. To do this, log in to OhioBuys. From the Main Menu Navigation bar, click **Contracts** and then select **Browse Contracts** from the drop-down menu.



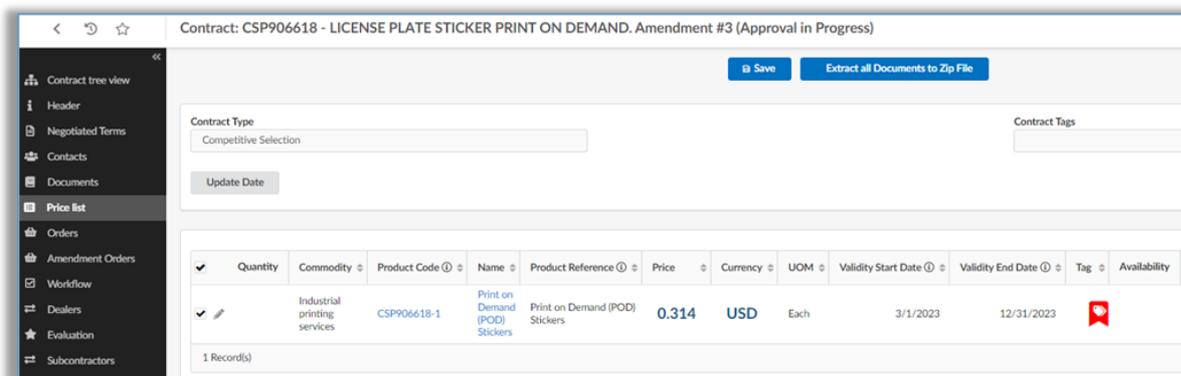
Under Advanced Search, users should first select a Supplier and then select a Contract Number when searching for a particular contract. Once you find the contract you are looking for, open the contract with the Pencil (✎) icon and then navigate to the Price List tab. Reviewing this tab will allow to understand how the contract is set up and how you should proceed with purchasing from that contract.



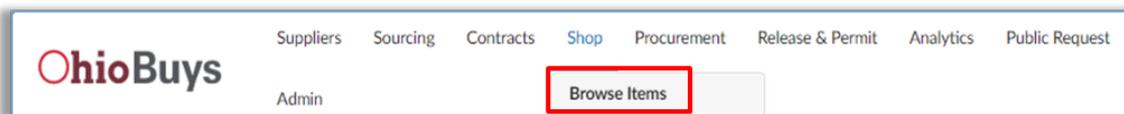
Scenario 1: Contract With Hosted Catalog Items

This scenario covers the instance when a user selects a contract that contains a list of hosted catalog items which are found in the Price List tab of that chosen contract. The user will then take the following steps to create a purchase requisition to submit for approval for the selected items.

1. Open a contract and navigate to the Price List tab. If the Price List contains a list of item(s) the contract has been set up with a hosted catalog.

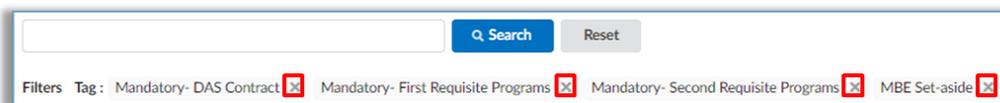


2. Navigate to the **Browse Items** page and search for the associated items.

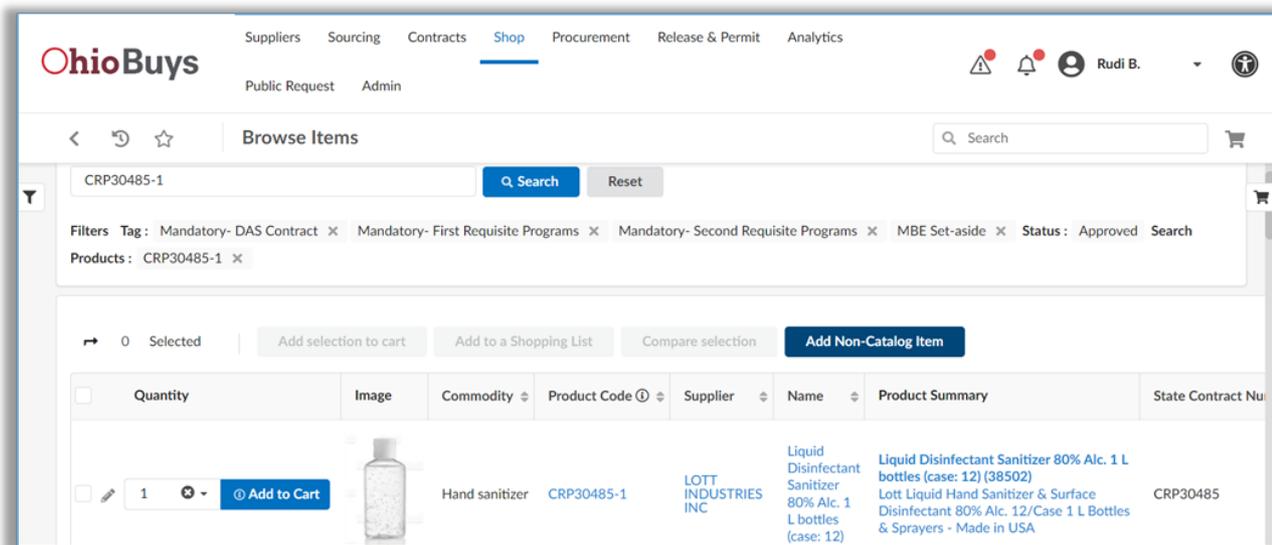


3. On the **Browse Items** page, users can search for specific contract numbers in the search bar and also have the option to remove filter tags by clicking on the X icon next to each filter.

- Note: No items will be displayed if all filters are removed, and no keywords are specified.



4. Once you have the item you are looking for, update the quantity as needed and then click Add to Cart. Continuing adding other items to your cart as needed and then begin the checkout process.

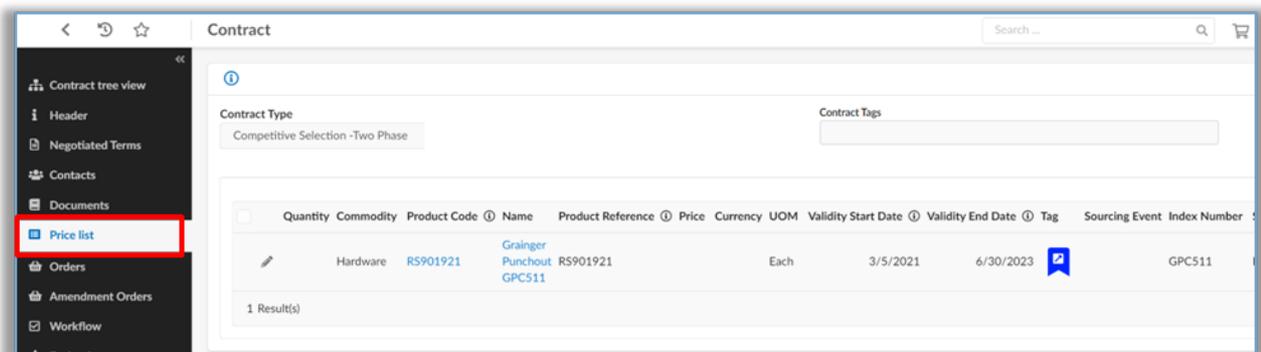


For additional details on how to submit a hosted catalog purchase requisition, refer to the *Adding Hosted Catalog Items to your Shopping Cart* section.

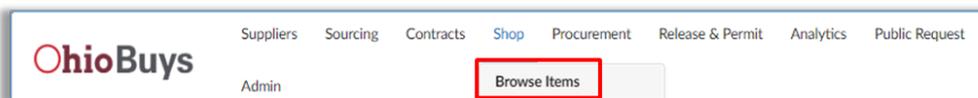
Scenario 2: Contract With a Punchout Catalog

This scenario covers the instance when a user selects a contract that contains a single item that references a punchout in the Price List tab of that chosen contract. The user will then take the following steps to launch the punchout and submit a purchase requisition for approval.

1. Open a contract and navigate to the Price List tab. If the Price List tab contains a single item that references a punchout, the contract has been set up with a punchout catalog.

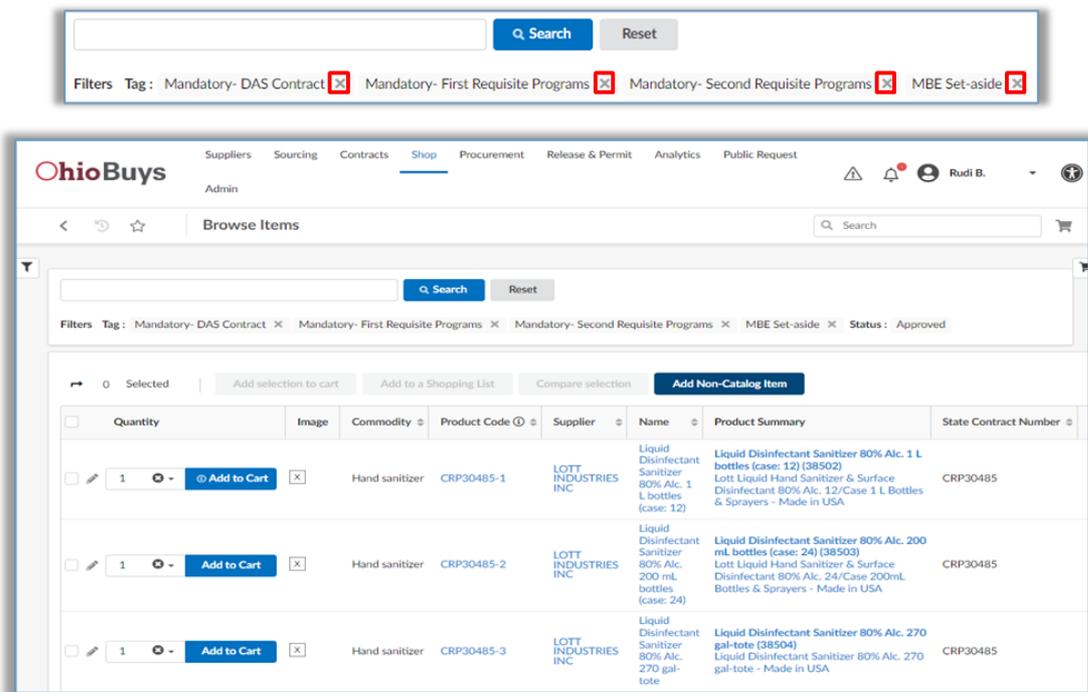


2. Navigate to the **Browse Items** page and search for the associated items.

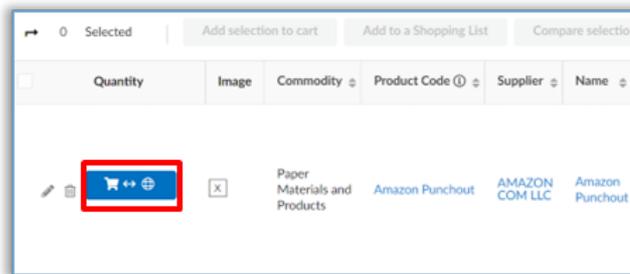


3. On the Browse Items page, users can search for specific contract numbers in the search bar and have the option to remove filter tags by clicking on the X icon next to each filter.

- Note: No items will be displayed if all filters are removed, and no keywords are specified.



4. Locate the relevant line item and then click the **Shop Online** icon to launch the punchout catalog.



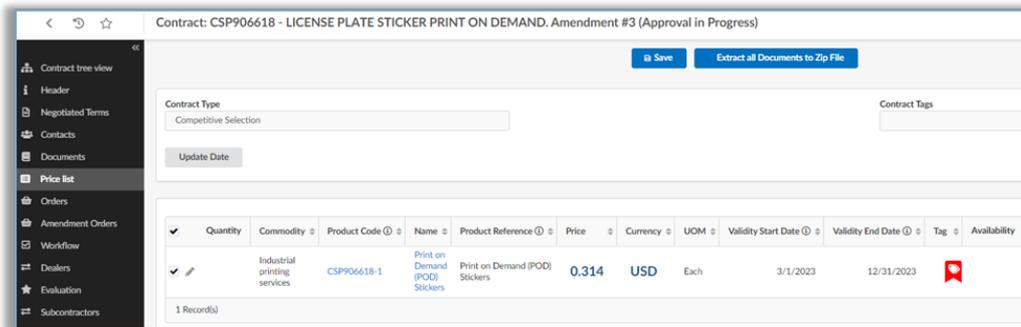
5. Add the item(s) you need to purchase from the punchout catalog according to that Supplier's purchasing process.

For additional details on how to submit a punchout catalog purchase requisition, refer to the *Adding Punchout Catalog Items to your Shopping Cart* section.

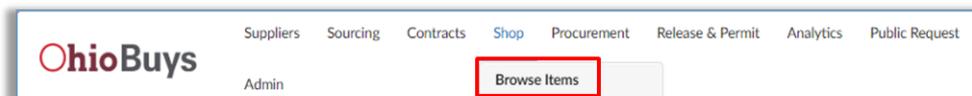
Scenario 3: Contract With Variable Pricing Line Items

This scenario covers the instance when a user selects a contract that contains item(s) close to \$0.00 in the Price List tab of that chosen contract. The user will then take the following steps to update the purchase requisition accordingly and submit for approval.

1. Open a contract and navigate to the Price List tab. If the Price List tab contains item(s) with \$0.00 or close to \$0.00 line items, the contract has been set up with variable pricing line items.

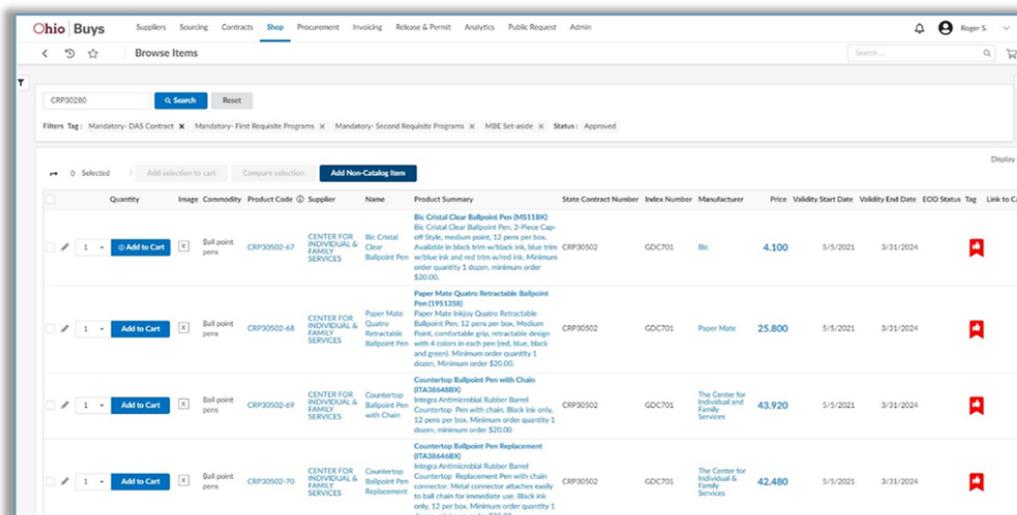
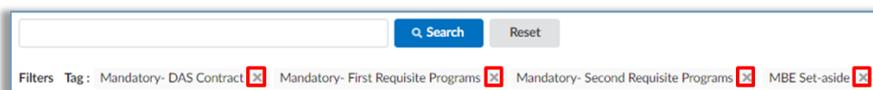


2. Navigate to the **Browse Items** page and search for the associated items.



3. On the **Browse Items** page, users can search for specific contract numbers in the search bar and also have the option to remove filter tags by clicking on the X icon next to each filter.

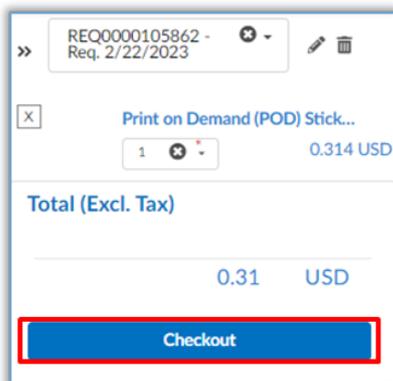
- Note: No items will be displayed if all filters are removed and no keywords are specified.



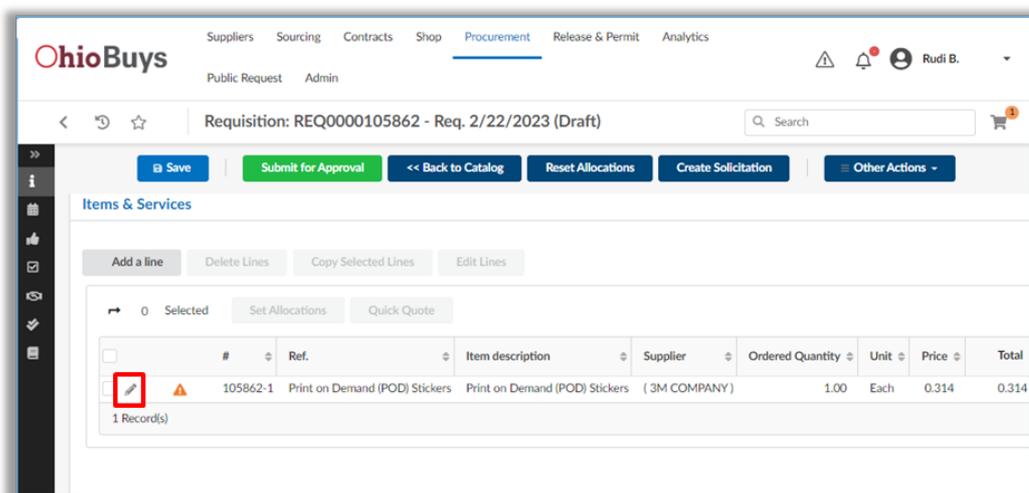
4. A list of items appear that can be added to the purchase requisition. Click **Add to Cart** to add the generic line item to a purchase requisition.



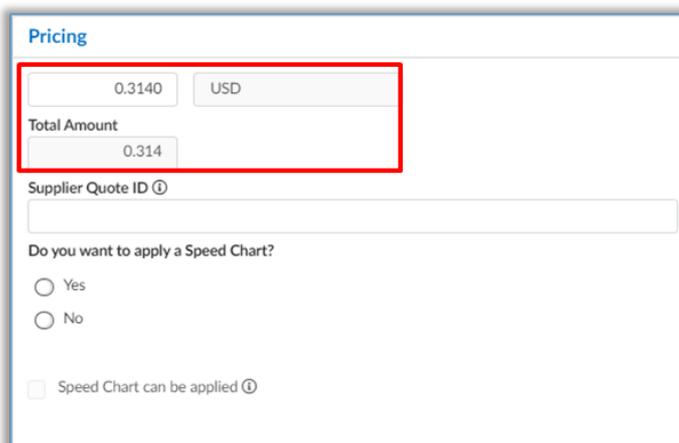
5. Click Checkout to be navigated to the purchase requisition page, where you can add shipping information and update the item.



6. Scroll down to the line item at the bottom of the purchase requisition and then click the Pencil () icon next to the line item to update the price.



7. Update the pricing and enter the corresponding quote ID. In addition, users should attach the quote to the header of the PR as a justification document and may also need to update the item name.

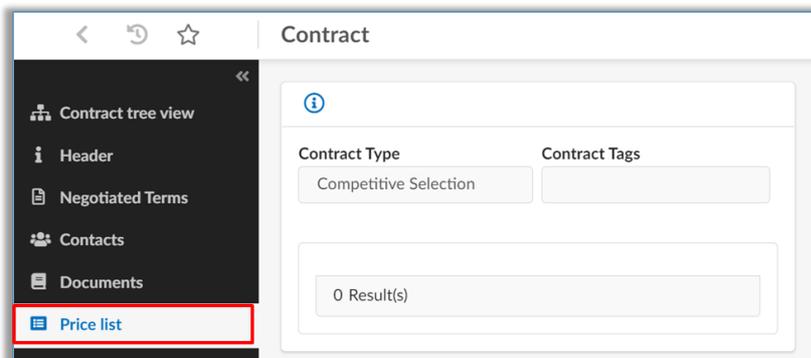


For additional details on how to submit a hosted catalog purchase requisition, refer to the *Add Hosted Catalog Items to your Shopping Cart* section.

Scenario 4: Contract With No Items

This scenario covers the instance when a user selects a contract that has no items listed in the Price List tab of that chosen contract. The user will then need to create a freeform purchase requisition to submit for approval.

1. Open a contract and navigate to the Price List tab. If the Price List tab contains no items, the contract has no catalog and freeform items will need to be entered to complete a purchase.



For additional details on how to submit a hosted catalog purchase requisition, refer to the *Add Freeform Catalog Items to your Shopping Cart* section.

Purchasing Services in OhioBuys

Coordinating purchases of services with a Supplier prior to completing/submitting a requisition is a best practice. In addition to making sure the Supplier is able to provide the service, this coordination assures that the buyer and Supplier are on the same page with respect to costs, scope of work, deliverables, and performance timeframes.

When submitting a purchase requisition for services, it's important to attach any documentation describing and supporting the reasons for and specifics of the purchase. This can be a letterhead quote, but it may also be a SOW document from the Supplier or copies of emails between the buyer and the Supplier. Detailed instructions on how to insert attachments, and the different attachment types can be found in the respective sections for each of the purchase requisition types.

All of this information must be reviewed prior to authorizing the purchase and, as necessary, additional information can be requested from the buyer.

In addition, please note that the Delivery Date field for a line item will not be shown if the Product Type is changed from Product to Services.

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

- Note: OhioBuys should **not** be used to create requisitions for travel expenses.

Capital Purchases in OhioBuys

OhioBuys is **capable of processing capital purchases** and is the preferred platform through which State users should create these purchase requests. This includes purchases referencing contracts or release and permits issued by the Ohio Facilities Construction Commission (OFCC).

Ohio OhioBuys Updating a User Profile in OhioBuys

Updated: 03/28/2025 03:45 PM

Version: 9.0

1 Purpose & Profiles

This job aid covers the different user profile options.

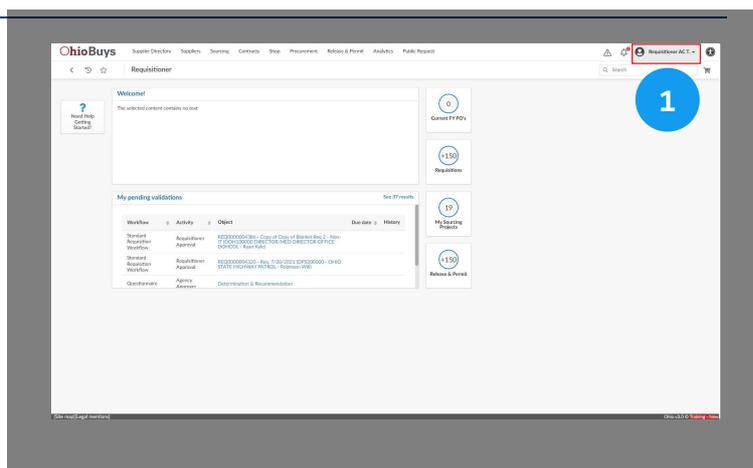
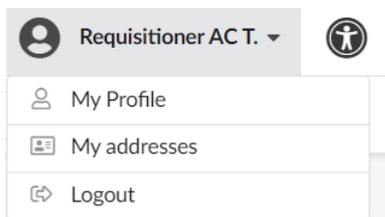
Profiles: All OhioBuys users

Used When

Reference this when setting up your profile in OhioBuys.

User's Name

1. On the upper right-hand side of the page, your name is displayed. Clicking on your name displays the User Options drop-down menu. This consists of 3 options:



My Profile, which allows you to view your personal account profile, where you can update your account settings, as well as add your Pcard information.

My Addresses, which allows you to view shipping and billing addresses in OhioBuys.

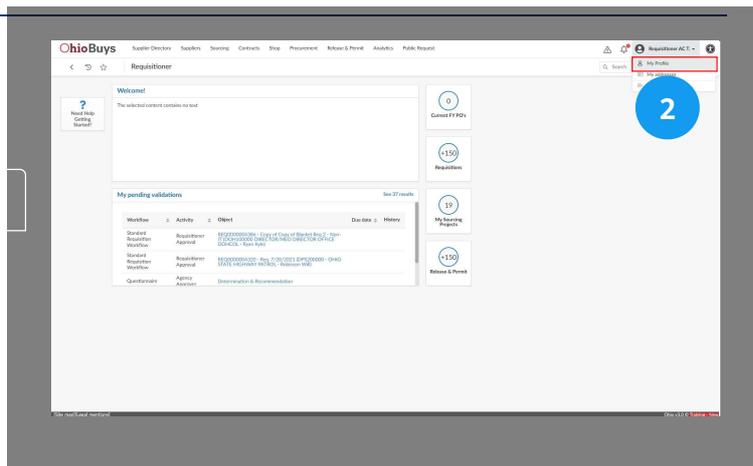
And, **Logout**. It's recommended that you do not use this option to log out of OhioBuys. If you would like to log out, close your browser window.

In addition, users will also be logged out after 30 minutes of inactivity.

My Profile

2. To update your user profile, click **My Profile**.

 My Profile



Default Settings

3. Here you can edit your **Default Settings**, you should update your Main Organization, Favorite Departments, Ship to, and Bill to addresses. This information will be saved when completing future requisitions.

Default settings

Main Agency

Main Organization

Receiver's Site Location

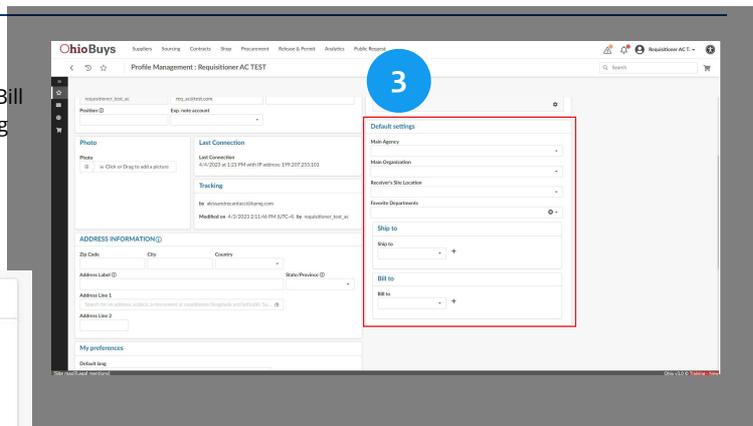
Favorite Departments

Ship to

Ship to +

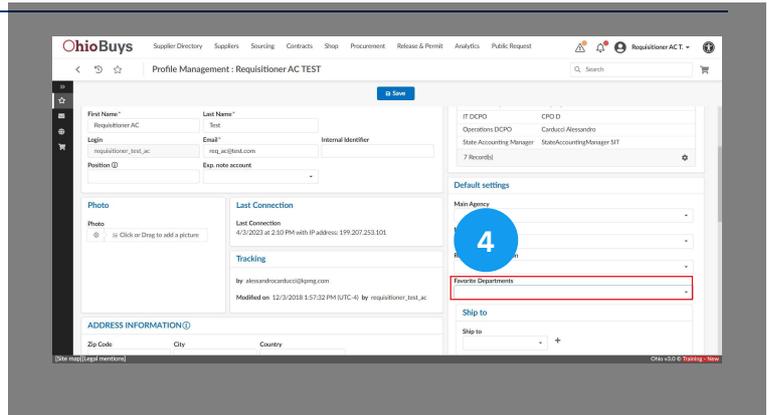
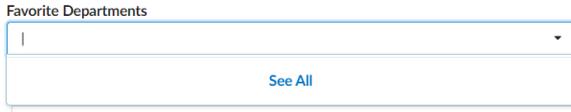
Bill to

Bill to +



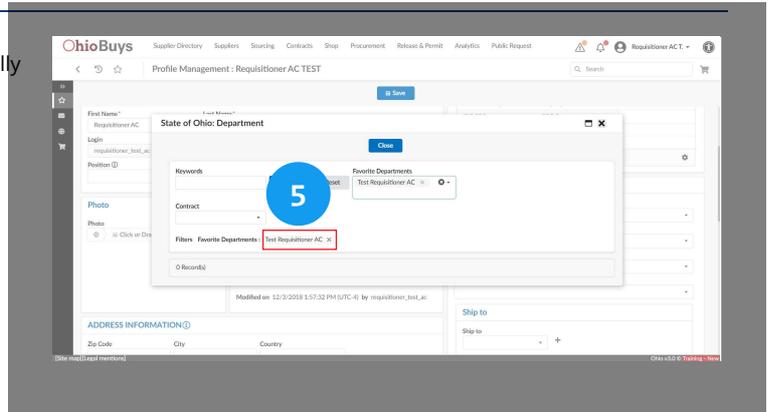
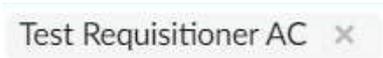
Favorite Department

4. When choosing your Favorite Departments, you will need to select **See All**.



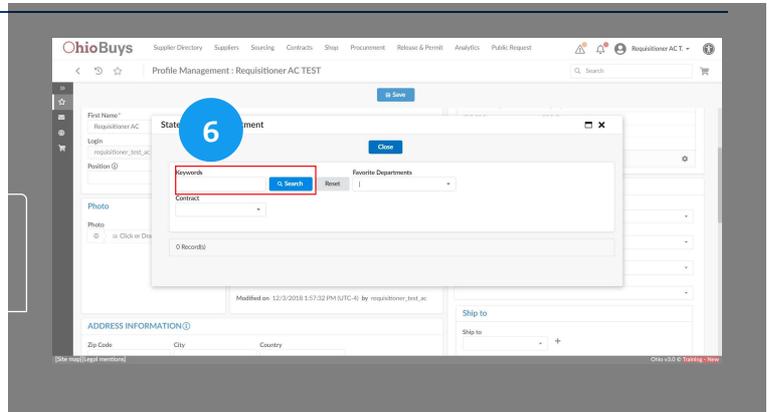
Clearing the Favorite Department Filter

5. To search for Departments, clear the filter that is automatically applied by clicking the X icon next to your name.



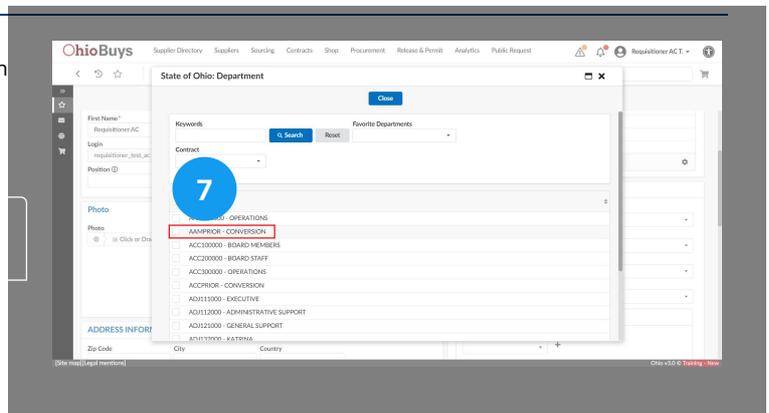
Searching for Favorite Departments

6. After clearing the filter, you can type your search into the Keywords search field, then click **Search**.



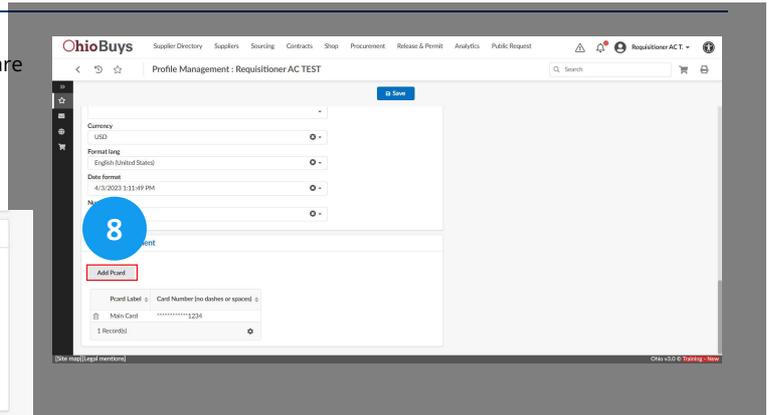
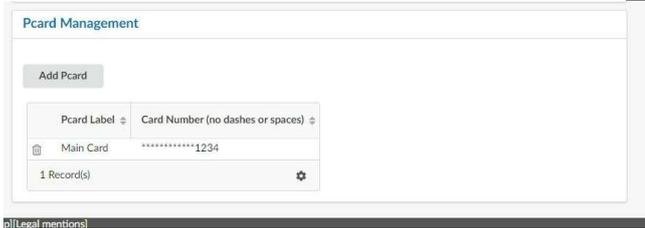
Selecting a Favorite Department

7. Select departments by clicking the checkbox to the left. When you are finished, click the X icon to close the window.



Pcard Management

8. At the bottom of the page, you can manage the Pcards that are associated with your account. To add a new Pcard, click the **Add Pcard** button.

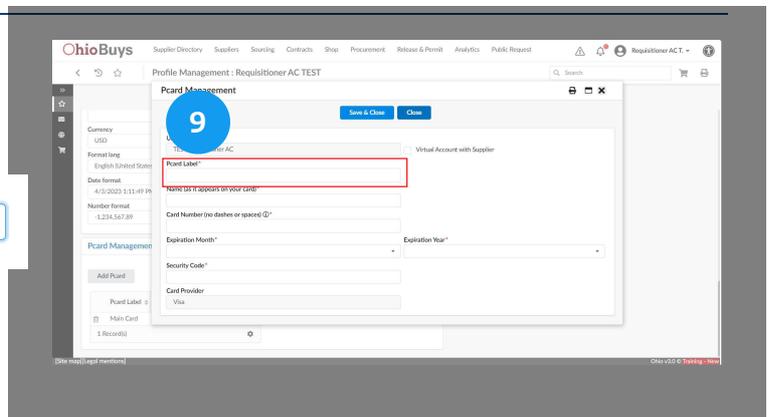


Entering Pcard Information

9. Enter a Pcard Label.

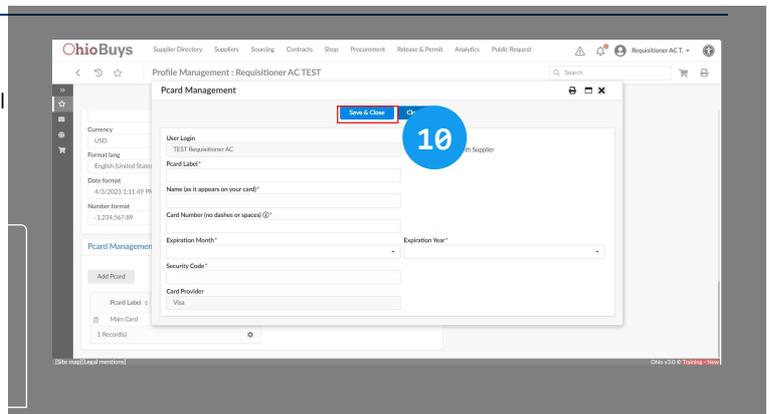
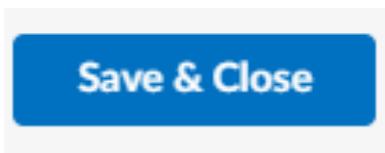
Pcard Label*

Name (as it appears on your card)*



Save & Close

10. Fill in the remaining Pcard information and then click **Save & Close**. Once a Pcard has been added, the card number will be masked and you will be unable to edit its details.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771
OR OBM.ContactCenter@obm.ohio.gov.

Submitting Purchase Requisitions

Topics

- Adding Hosted Catalog Items to your Shopping Cart
- Adding Punchout Catalog Items to your Shopping Cart
- Adding Freeform Items to your Shopping Cart
- Completing Checkout for Purchase Requisitions
- Submitting a Pcard Purchase
- Completing Chartfield Information



OhioBuys Adding Hosted Catalog Items to your Shopping Cart

Updated: 03/26/2025 06:55 PM

Version: 9.0

Purpose & Profiles

This job aid covers the process for completing the checkout process for a Standard purchase requisition.

Profiles: Requesters, Requisitioners

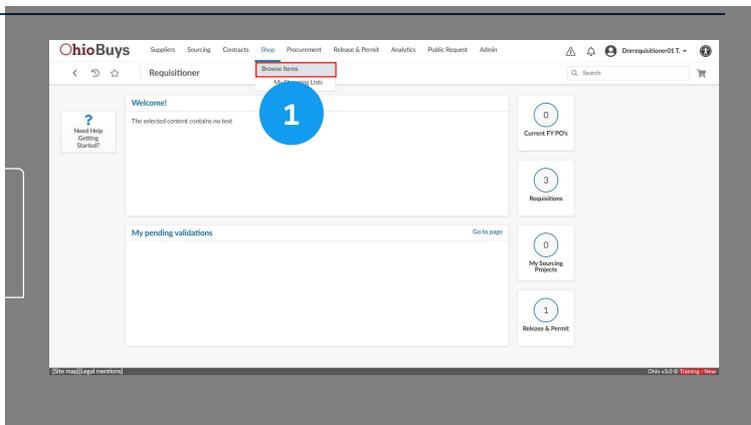
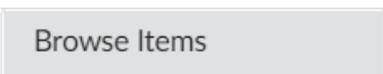
Used When

Reference this after adding purchase requisition items to your cart and beginning the checkout process.

To submit a Hosted Catalog Purchase, click on **Shop** in the Main Menu Navigation Bar.

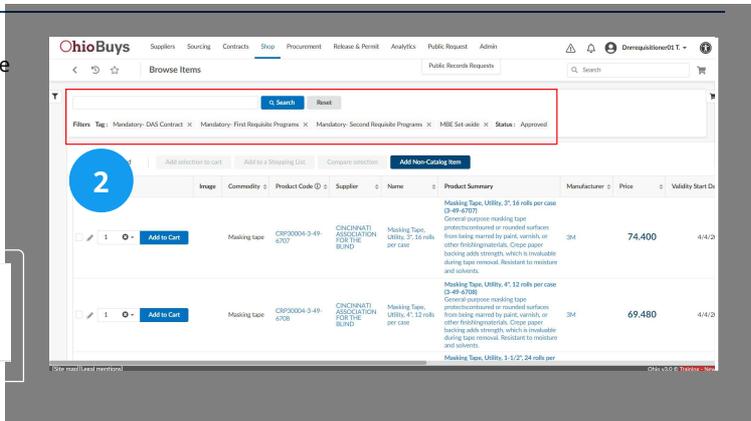
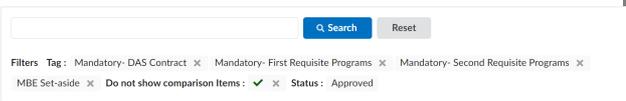
Browse Items

1. Click on the **Browse Items** page.



Search and Filter Options

2. The Browse Items page is displayed. Enter search terms in the **Keywords** field and then click **Search**. Search terms can include descriptors for the item such as item label description, item number, index number, manufacturer part number, etc.



Item Tags

The Browse Items Page defaults to list Hosted Catalog Items as well as listing default Item tags. Item tags indicate if a hosted catalog item is tied to that tag. For example, if an item has a Mandatory First Requisite tag that means that item is tied to a Mandatory First Requisite.



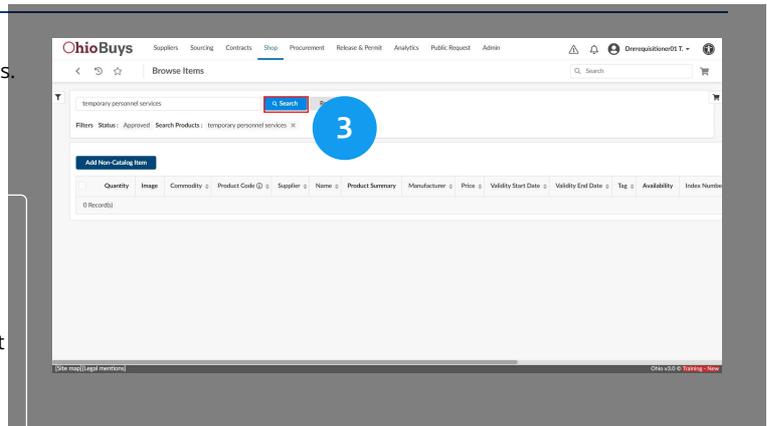
Item tags also indicate if an item has a dealer or is linked to an MBE Set-Aside contract. If your initial search results do not include the item(s) you would like to purchase, click the X icon to remove a tag.

Keyword Search

3. Click the **Search** button to search for the hosted catalog items. The results will be listed below.



If the results are unsatisfactory, click the **Reset** button to refresh your query. If you click reset, the search will refresh as when first clicked on. Item tags will reset and the hosted catalog items that display on the first page will be seen again. The user can then navigate through the entire hosted catalog without searching if desired.

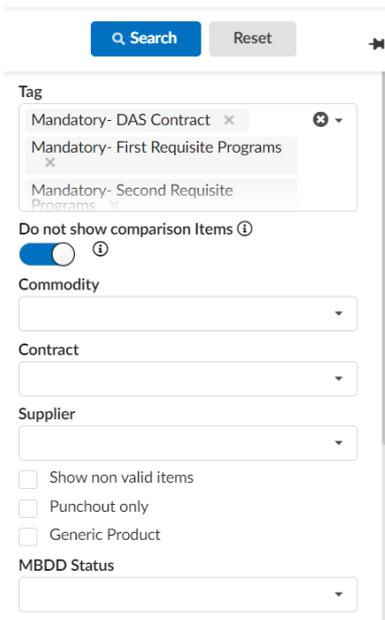
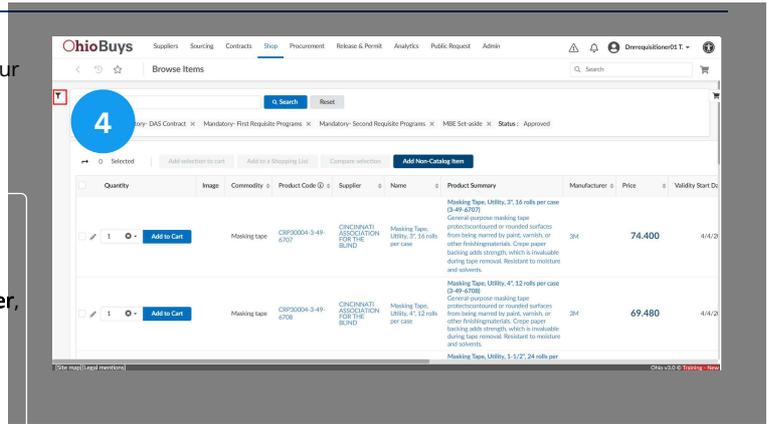


Advanced Search

4. Click the **Filter** icon to access advanced search options for your hosted catalog item.



Use these additional search filters such as **Manufacturer**, **Supplier**, or **State Contract Number** to search for an item. For example, searching for a specific Supplier will display items that are associated with the selected Supplier.

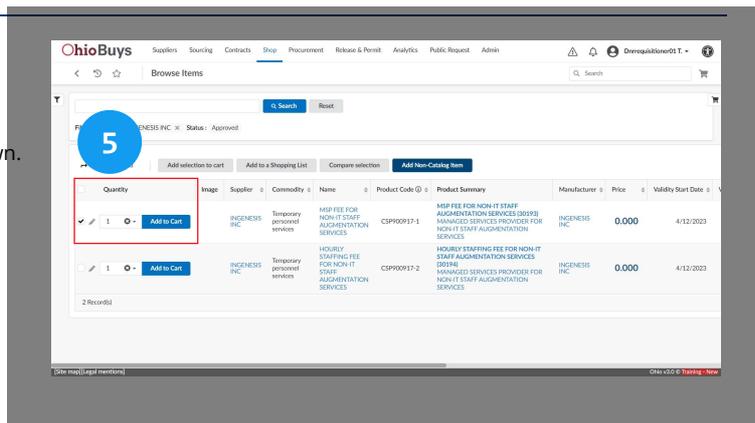


Use multiple advanced search filters to narrow your search. These advanced fields can be combined with keyword search. After entering all desired fields, click the **Search** button. The results will then be displayed.

View Displayed Results

5. On the results page, choose your item(s) by selecting the checkbox(es) next to the item(s). Once you have selected the checkbox(es), you can adjust the quantity by either manually inputting the quantity or selecting the quantity from the dropdown. Click the **Add to Cart** button.

Quantity



For instructions on completing a Pcard purchase, please refer to the following document:

[Submit a Pcard Purchase](#)

▲ Note

To compare items side-by-side in OhioBuys, click the Checkbox icons for the items you wish to compare and then click **Compare selection**. Comparing Items is not a mandatory process to add items to your cart. If you know which specific item you would like, that item may be added directly.

Compare selection

▲ Note

If you cannot find the good or service you would like to request, click **Add Non-Catalog Item**. Refer to the *Add a Freeform Item to a Purchase Requisition* asset for more information.

Add Non-Catalog Item

▲ Note

You can also change the order in which columns are displayed in the search results by right-clicking on any column name. From the subsequent menu, drag and drop the order of the displayed columns to fit your needs.

Grid settings

Freeze grid header

Grid page size :
15

Grid column settings

Select all rows

Editing column

Deleting column

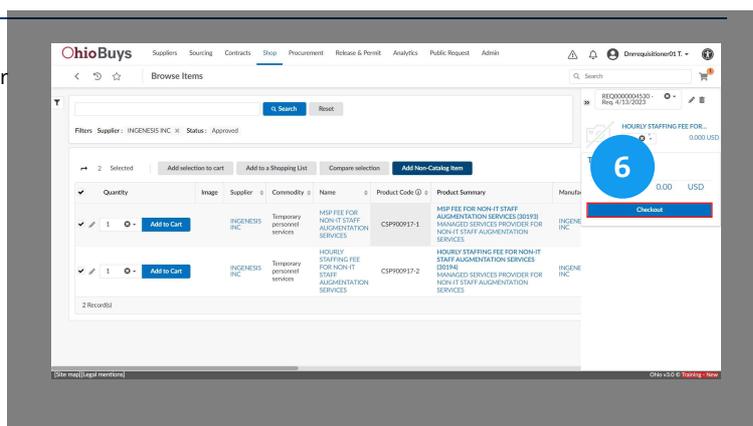
Quantity

Image

Product Code

Checkout Items

6. Click **Checkout** to navigate to the purchase requisition header and begin the checkout process.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Adding Punchout Catalog Items to your Shopping Cart

Updated: 03/28/2025 03:49 PM

Version: 10.0

1 Purpose & Profiles

This job aid covers how to submit a punchout catalog purchase requisition in OhioBuys.

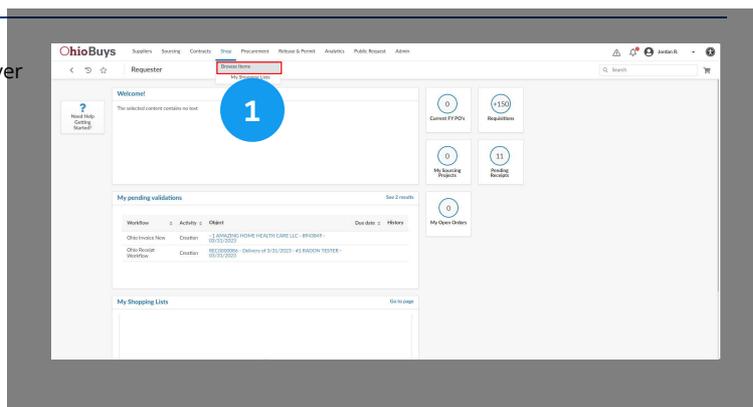
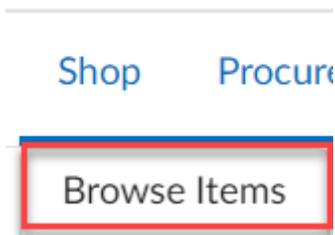
Profiles: Requester, Requisitioner

2 Used When

Reference this when purchasing an item from a punchout catalog.

Shop: Browse Items

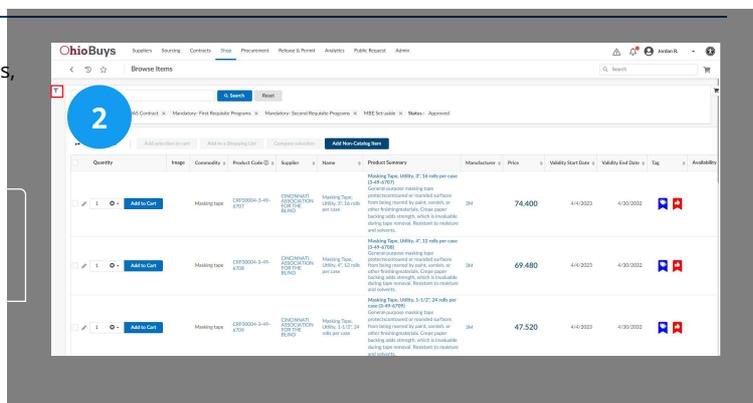
1. Log in to OhioBuys. From the Main Menu Navigation bar, hover over **Shop** and then select **Browse Items** from the drop-down menu.



More Filters

2. To limit the displayed items to only include punchout catalogs, click the **More Filters** icon.

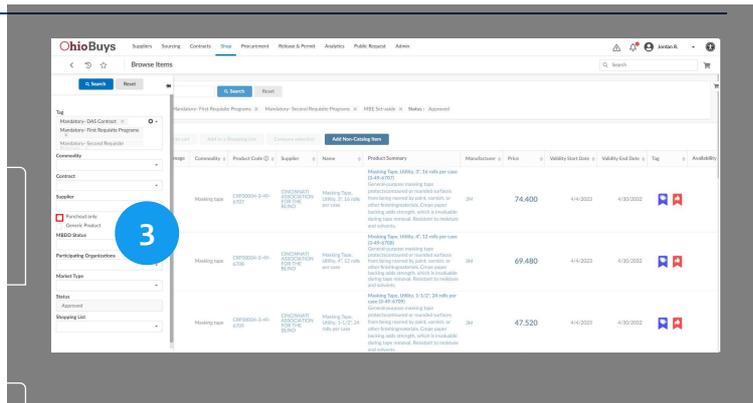
More Filters icon



Punchout Only Checkbox

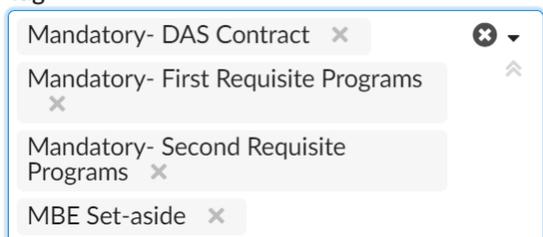
3. Select the **Checkbox** icon to filter for **Punchout only**.

Checkbox icon



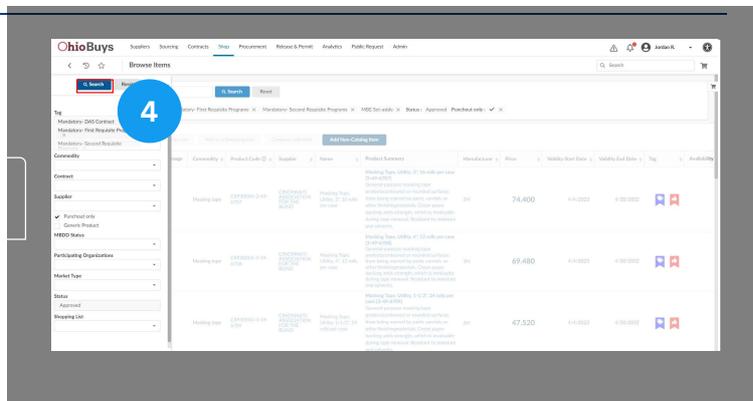
To filter and search for a punchout catalog from a specific supplier or contract, clear the item filters in the Tag drop-down list and enter the supplier or contract name in the field you would like to search.

Tag



Search

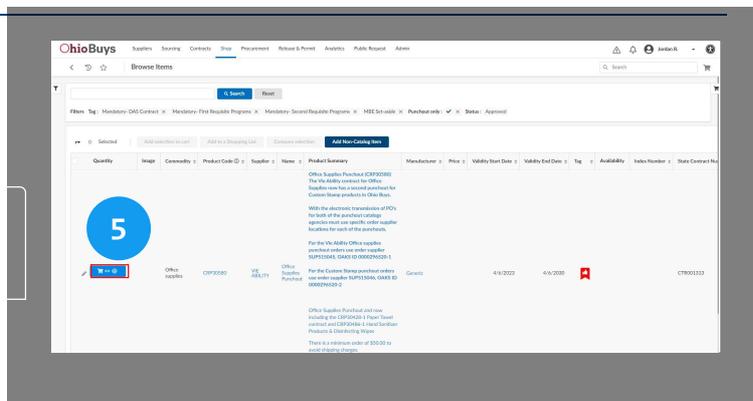
4. Click **Search**.



Shop Online

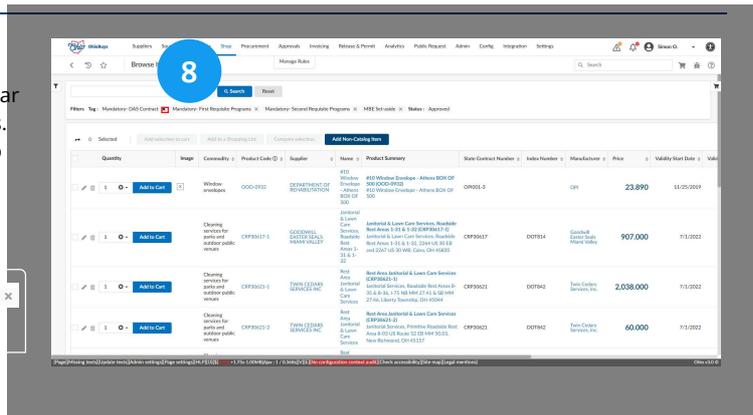
5. Once you have located the Supplier whose punchout catalog you would like to access, click the **Shop Online** icon.

Shop Online icon



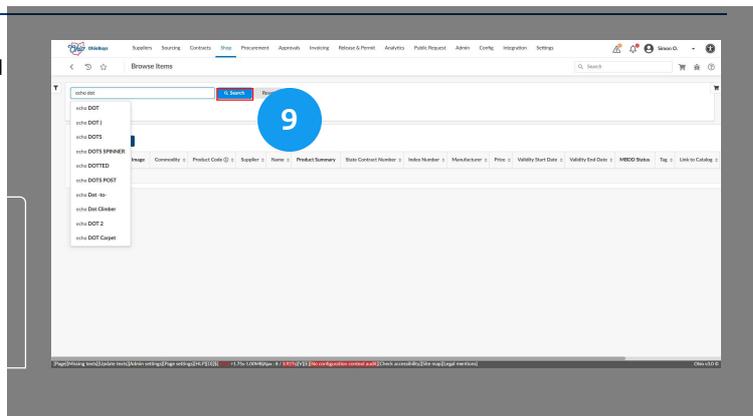
Add Amazon Items using Search 360

8. Amazon Punchout catalog items can be added using the keyword search via Search 360. These items will appear like regular hosted catalog items, except there will be no pencil or trash icons. They cannot be modified; they can only be compared or added to the cart. Begin by clicking the X icon to remove the default filters.



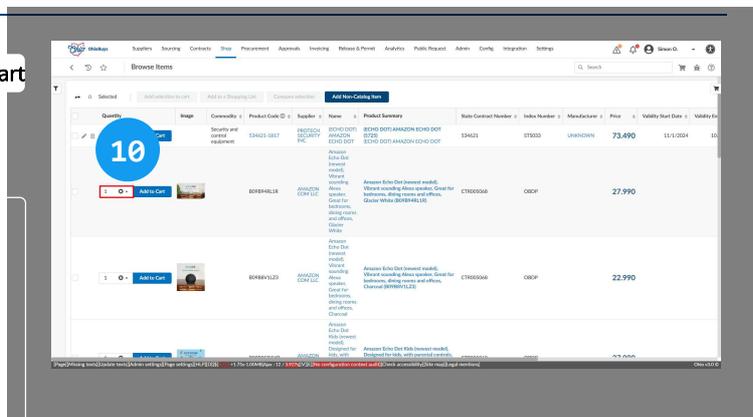
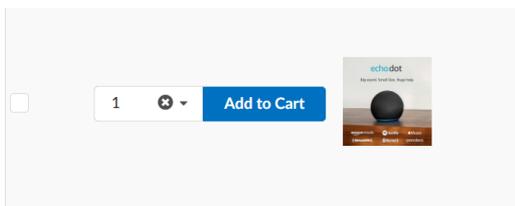
Item(s) Search

9. Enter in the desired Amazon item in the keyword search field and click Search.



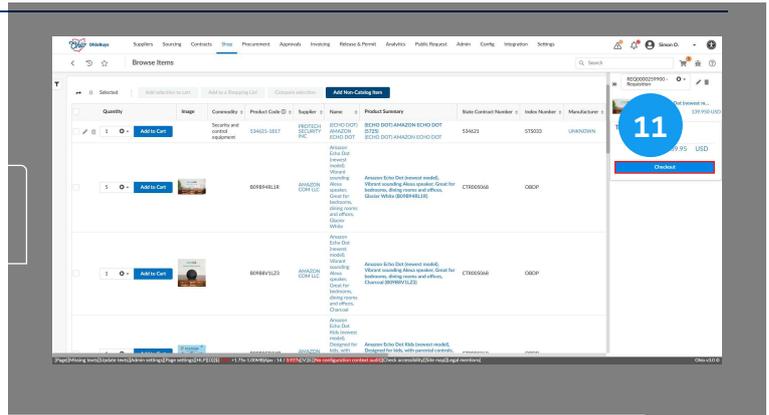
Add Item(s) to Cart

10. Update the quantity of your desired item and click Add to Cart



Checkout

11. Click **Checkout** to complete the requisition process.



▲ Note

When checking out items from Amazon added in this manner, users may only submit their purchase as a Pcard purchase. Users should not be combining these items in a purchase requisition with items from any other Supplier.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Adding Freeform Items to your Shopping Cart

Updated: 05/05/2025 08:43 PM

Version: 16.0

1 Purpose & Profiles

This job aid covers the process for creating a freeform item and submitting a purchase requisition containing a freeform item.

Profiles: Requesters, Requisitioners

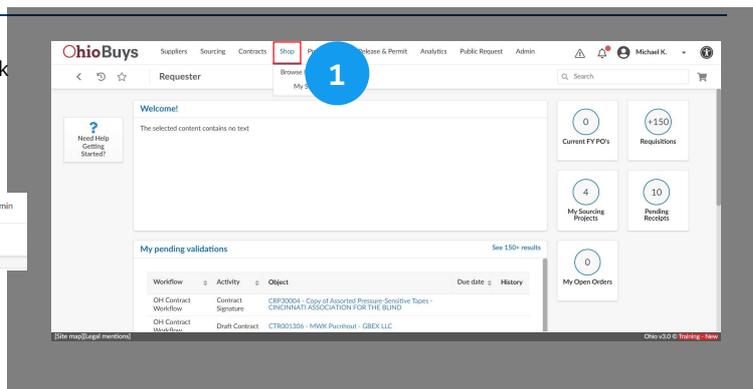
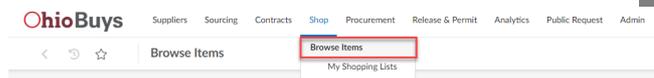
2 Used When

Reference this when creating a new purchase requisition using freeform line items.

A **Freeform** line item refers to a line item created by the user, rather than an item selected from either a Supplier's Hosted or Punchout catalog.

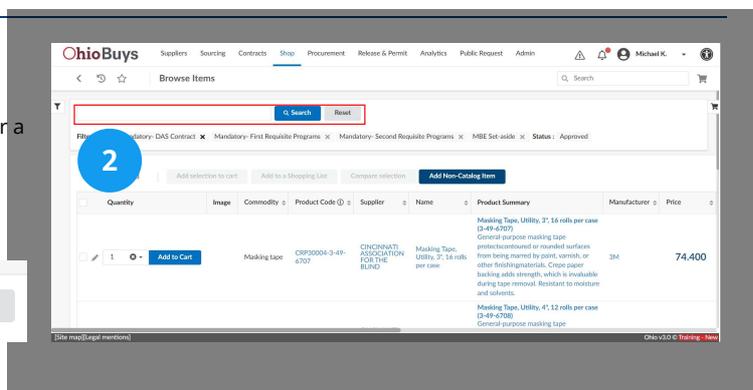
Shop: Browse Items

1. Log in to OhioBuys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.



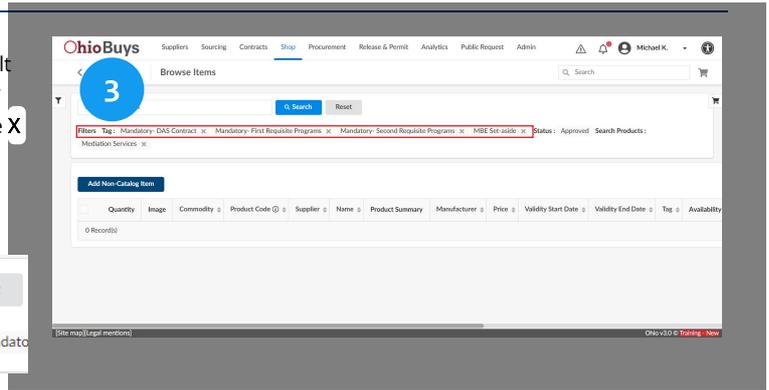
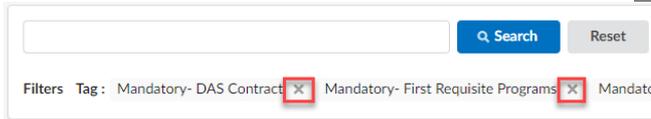
Initial Search

2. Before creating a freeform item, users should first perform a search for the item to determine whether it appears in any of the high-priority contracts associated with the default item tags. Enter a search term in the **Keywords Search** field and then click **Search**.



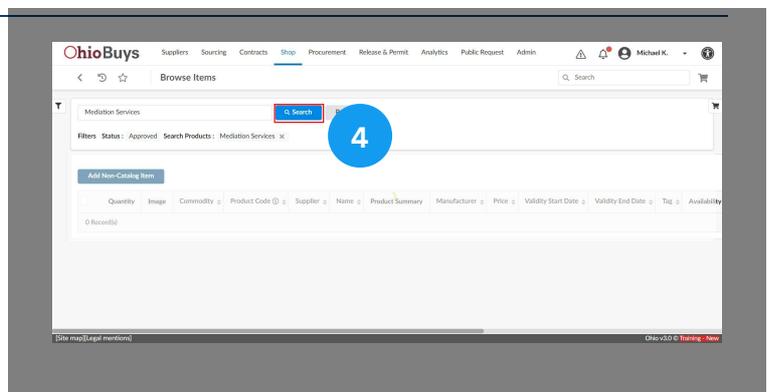
Clear Filters and Search

3. If no results are displayed, users should then clear the default OhioBuys filters and search for the item to determine whether or not it appears in any other hosted or punchout catalogs. Click the X icon next to the default filter tags to remove the filters.



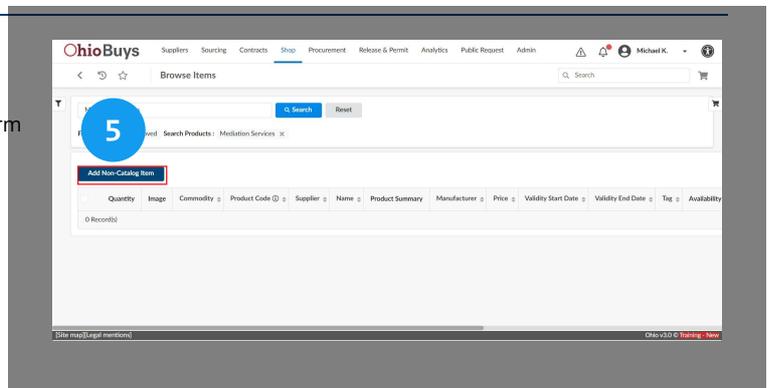
Keywords Search

4. Click Search.



Add Non-Catalog Item

5. After confirming that you are unable to find what you are looking for in OhioBuys, or if the contract you are ordering from does not have a price list, you can proceed with creating a freeform line item. Click **Add Non-Catalog Item**.



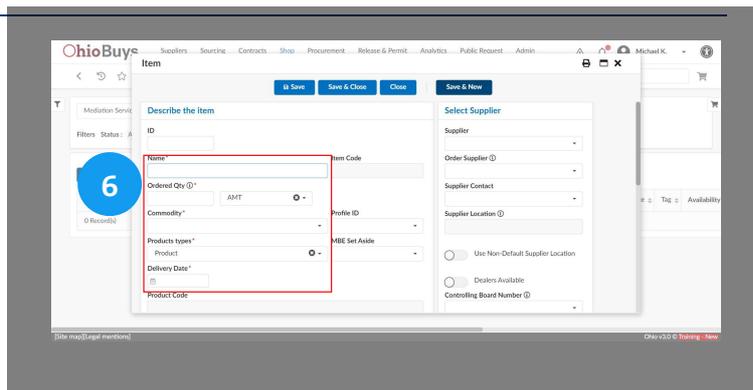
▲ Note

Some contracts in OhioBuys do not have a price list associated with them. If this is the case, you will need to add freeform line items to a purchase requisition in order to purchase from that contract.

As a reminder, you can see if a contract has a price list in OhioBuys by opening a contract from the Browse Contracts page and navigating to the Price List tab. If the Price List tab does not contain any items, then you will need to add freeform line items to a purchase requisition in order to purchase from that contract.

Required Fields

6. Complete the required fields for the item indicated by a red asterisk.



Mandatory Freeform Item Fields

Name *	<input type="text"/>	Item Code	<input type="text"/>
Ordered Qty *	<input type="text"/>	AMT	<input type="text"/>
Commodity *	<input type="text"/>	Profile ID	<input type="text"/>
Products types *	Yes	MBE Set Aside	<input type="text"/>
Delivery Date *	<input type="text"/>		

Enter the **Name** of the good or service you would like to request. The Name should be a short description of the good or service.

Enter the **Ordered Quantity** and adjust the Unit of Measure as needed.

- If you plan to encumber to OAKS and enter receipts against the PO, then you must use a Unit of Measure other than "AMT".
- If the purchase order is likely to result in multiple invoices, users should not use a quantity-based unit of measure (i.e., a unit of measure other than 'AMT') and a quantity of one. The use of "force pricing" is not allowed and invoices billing a partial quantity with a quantity-based unit of measure (e.g., Each) and one as the quantity will be rejected.

Enter and select the associated **Commodity**. You should select the most applicable commodity code as possible.

- 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. Note that if a commodity code you wish to select is not currently in OhioBuys, you will need to submit a help desk ticket in order for it to be added.

Select the **Product** type (e.g., Product or Services).

If this purchase is supposed to be an MBE Set Aside or EDGE purchase, select using the **MBE Drop-Down** menu. Agencies should denote on the PO line comments if vouchers referencing that line item should be flagged as MBE set-aside.

- M indicates the item is an MBE item
- E indicates the item is an EDGE item
- N indicates the item is neither MBE, nor EDGE

Select the **Delivery Date** (or date range for Services).

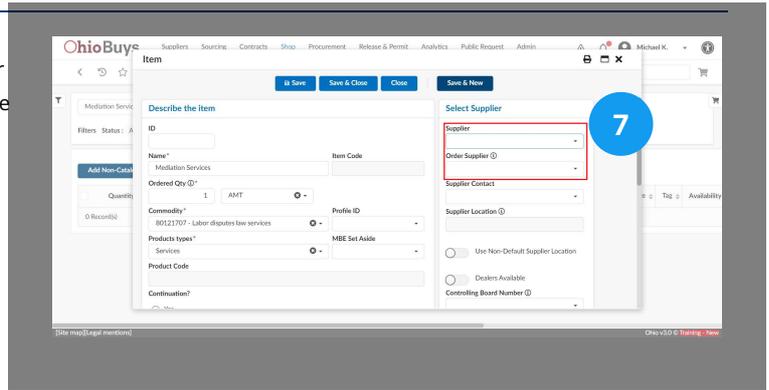
- In addition, please note that the Delivery Date field for a line item will disappear if the Product types is changed from Product to Services.

Supplier & Order Supplier

7. If you know the **Supplier** that will provide the item enter their name in the Supplier field. If you know the **Order Supplier** (i.e., the Supplier location that will fulfill the order) select it in the Order Supplier field.



The 'Select Supplier' dialog box contains two dropdown menus. The first is labeled 'Supplier' and the second is labeled 'Order Supplier' with an information icon to its right.



If available, users should also enter the **Supplier Contact**, which is the person at the Supplier who will be responsible for the order.



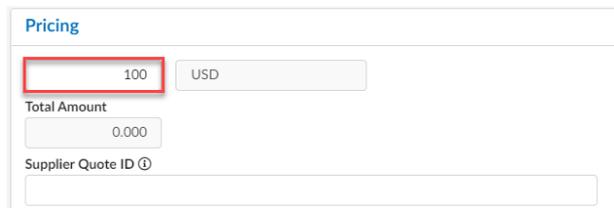
A single-line text input field labeled 'Supplier Contact' with a dropdown arrow on the right side.

▲ Note

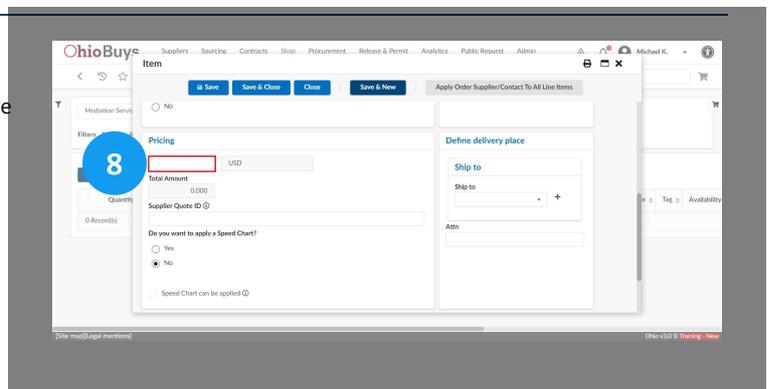
Only Suppliers registered in OhioBuys will appear when searching in the Supplier field.

Pricing

8. Scroll down and enter the **Pricing** for the item. If you do not know the item's price, and will be performing a Quick Quote, leave this field blank.



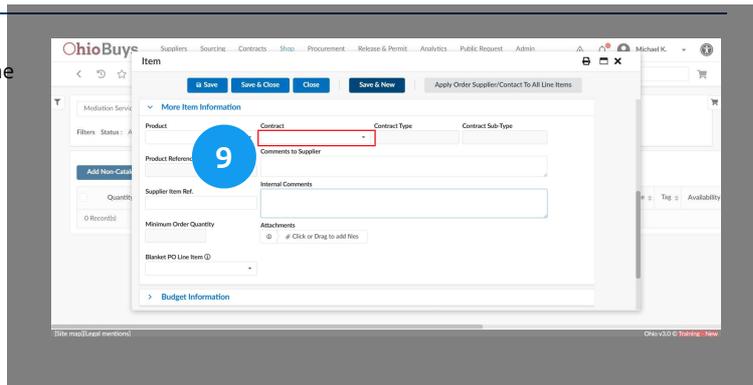
The 'Pricing' dialog box features a text input field containing '100' and a 'USD' dropdown menu. Below these are fields for 'Total Amount' (displaying '0.000') and 'Supplier Quote ID' with an information icon.



Select applicable contract number

9. Scroll down and enter the **Contract** number for the item if one is applicable.

Contract



▲ Note

Only signed contracts will appear in the Contracts field in the line item information for freeform purchase requisitions.

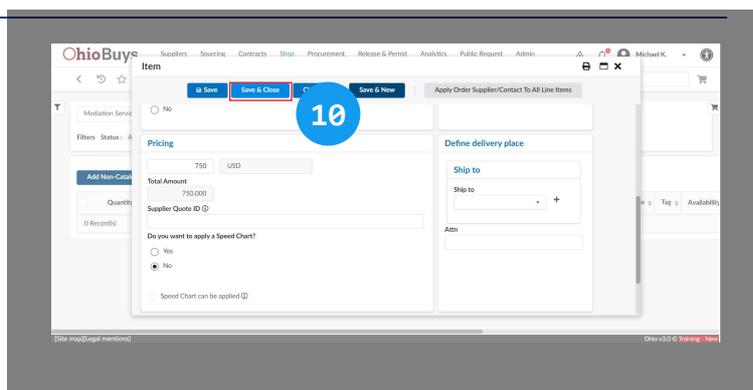
On requisitions referencing ACS contracts combining IT and non-IT items, agencies should reference the NIT contract on both the IT and non-IT line items. The IT line items (i.e., those using an IT account code) will receive an IT R&P via the requisition existing workflow.

Users can leverage freeform requisitions to pre-stage some purchase orders. To do so, these requisitions may reference contracts in "Awaiting Effective Date" status that are not awarded by DAS. After starting and saving a freeform purchase requisition line, Awaiting Effective Date contracts will appear in the Contracts field for selection.

Save & Close

10. Click **Save & Close**.

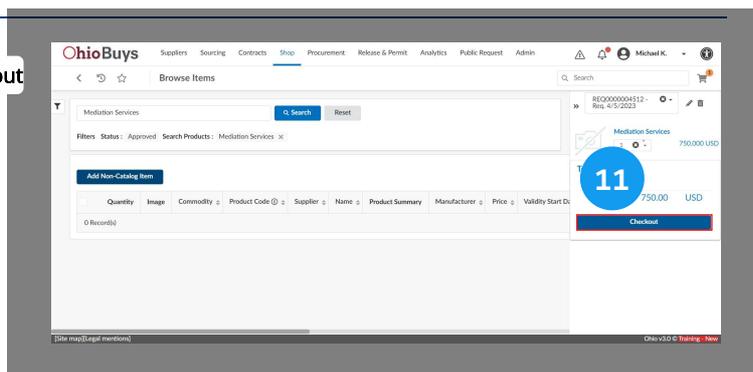
Save & Close



Checkout

11. The item has been added to the shopping cart. Click **Checkout**.

Checkout

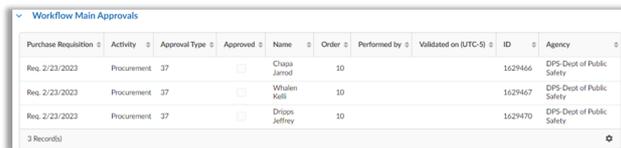


▲ **Note**

After your requisition has been submitted for review, you can check its approval status at any time.

If you would like to print the details of your requisition, click the Print () icon in the top right of the page.

To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.



Purchase Requisition	Activity	Approval Type	Approved	Name	Order	Performed by	Validated on (UTC-5)	ID	Agency
Req. 2/23/2023	Procurement	37	<input type="checkbox"/>	Chase Jarrod	10			1629466	DPS Dept of Public Safety
Req. 2/23/2023	Procurement	37	<input type="checkbox"/>	Whalen Malli	10			1629467	DPS Dept of Public Safety
Req. 2/23/2023	Procurement	37	<input type="checkbox"/>	Driggs Jeffrey	10			1629470	DPS Dept of Public Safety

3 Record(s)

On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.

You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Completing Checkout for Purchase Requisitions

Updated: 03/26/2025 07:07 PM

Version: 5.0

Purpose & Profiles

This job aid covers the process for completing the checkout process for a Standard purchase requisition.

Profiles: Requesters, Requisitioners

Used When

Reference this after adding purchase requisition items to your cart and beginning the checkout process.

Purchase Requisition Header

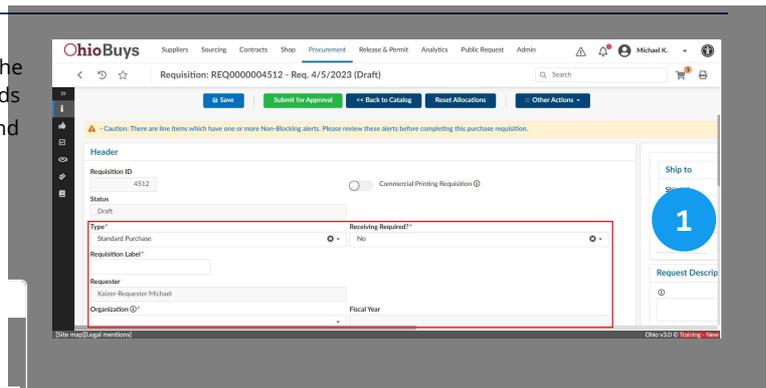
1. To begin the Checkout process, users should first complete the Purchase Requisition Header. Users must fill in all mandatory fields marked with a red asterisk, such as the **Requisition Label**, **Type** and **Receiving Required** fields. Users should also fill in any non-mandatory fields as appropriate.

Note

Users may see two types of alerts on both the purchase requisition header, and the line items at the bottom of the page.

- Action Required: There are line items that have one or more Blocking Alerts.

- Caution: Missing order supplier for line item(s).



Blocking alerts prevent the user from moving forward in a process. This means submitting, saving, approving, and rejecting cannot be completed until the alert is addressed.

Non-Blocking (i.e., caution or info) alerts serve as a warning and are usually a request for additional information or documentation. These alerts allow the user to move forward in a process; however, these alerts can become blocking alerts for other users or approvers. It is important to review the issues related to these alerts and resolve them if possible.

For more information and information on specific alerts, please refer to the Resolving Alerts Job Aid on the [OhioBuys training website](#).

Mandatory Purchase Requisition Header Fields

Header

Requisition ID

Status

Type*

Receiving Required?*

Requisition Label*

Requester

Organization ⓘ*

Fiscal Year

Business Unit*

Budget Date*

Commercial Printing Requisition ⓘ

- **Type:** Update this field to indicate if this is a special kind of purchase requisition (e.g., Pcard, After-the-Fact, etc.) otherwise leave it as **Standard**.
- **Receiving Required:** Indicate if you would like to require a receipt for this purchase requisition in OhioBuys. This field defaults to "No". If you select Yes, a receipt must exist in OhioBuys in order for any Supplier submitted invoices to be processed.
- **Requisition Label:** Enter your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is "Office Supplies JD").
- **Organization,** which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.
- **Budget Date:** By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.

▲ Note

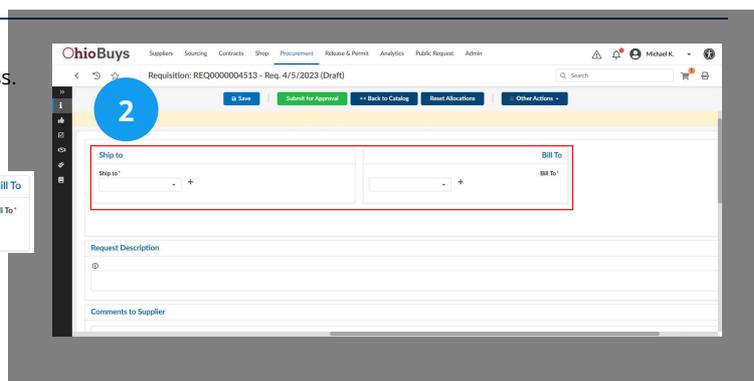
Users with the Requisitioner (On Behalf of) profile are also able to update the **Requester** field if the purchase requisition is being created for another user. In order to make this update, users must first select their Organization and then click **Save**. Users will then be able to update the Requester field only with users that are within their scope.

Ship To and Bill To

2. Scroll to the right to enter the **Ship To** address, **Bill To** address.

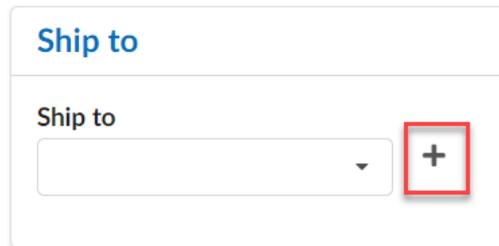
Ship to

Bill To



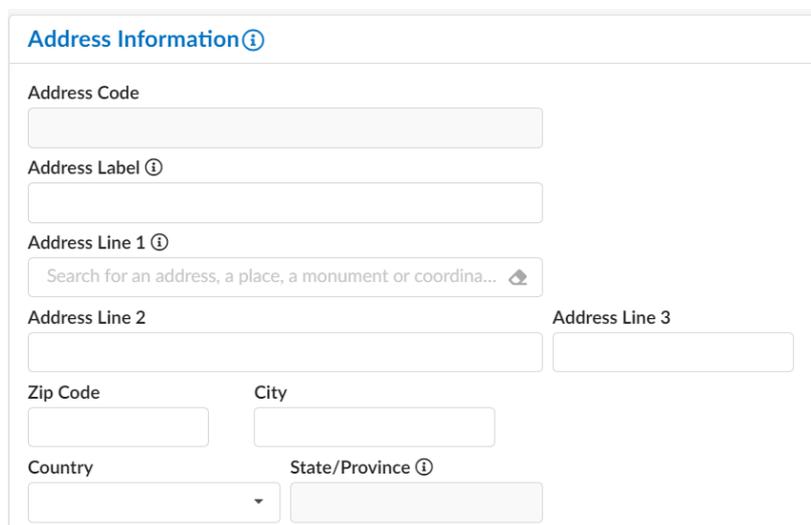
▲ Note

- The Ship To and Bill To fields will automatically populate if users have set up the Default Settings on their profiles for these fields.
- OhioBuys will only display options for the Ship To and Bill To fields that are registered with the State. Users can request to have an order shipped to an ad-hoc shipping address by clicking the + icon, and manually entering the address information.



The image shows a 'Ship to' dropdown menu. The text 'Ship to' is displayed above a white input field with a downward arrow. To the right of the input field is a red square button containing a black plus sign (+).

- Enter the Address Label (a nickname for the address), Address Line 1, City, State/Province, Zip Code, and Country. Then click **Save & Close**.



The image shows a form titled 'Address Information' with an information icon. The form contains the following fields:

- Address Code: A text input field.
- Address Label: A text input field with an information icon.
- Address Line 1: A text input field with an information icon and a search suggestion dropdown: 'Search for an address, a place, a monument or coordina...'. A location pin icon is on the right.
- Address Line 2: A text input field.
- Address Line 3: A text input field.
- Zip Code: A text input field.
- City: A text input field.
- Country: A dropdown menu.
- State/Province: A text input field with an information icon.

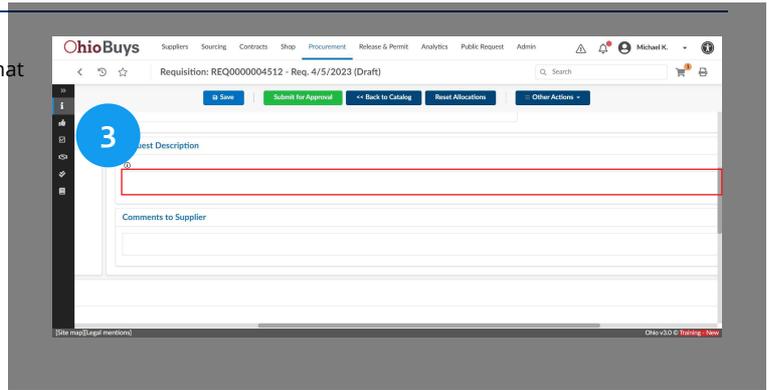
- Address autocomplete is available when typing an address into Address Line 1, so addresses will be automatically suggested based on what has been entered into the field.
- Users **must** remember to complete the country field when using a one-time delivery address.
- After you have added the one-time delivery address, you must select it from the drop-down menu in the **Ship To** field. To do this, enter the Address Label for your address and then select the associated address from the drop-down menu. Note that each new addresses created in this manner will have ADHOC in front of it.
- When using a one-time shipping address, the purchase will be routed for additional approval by the users Agency Admin.

Request Description

3. Fill in the **Request Description** field with an explanation of what the purchase is for.

Request Description

(Information icon)



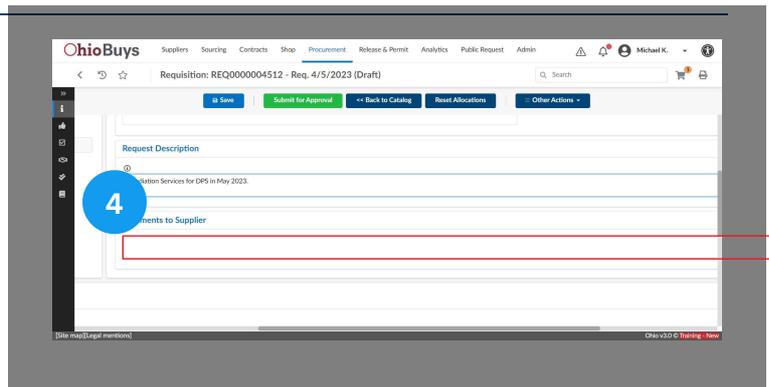
▲ Note

Information in the Request Description field will **not** be visible to Suppliers.

Comments to Supplier

4. Fill in the **Comments to Supplier** field with any applicable comments to the Supplier.

Comments to Supplier

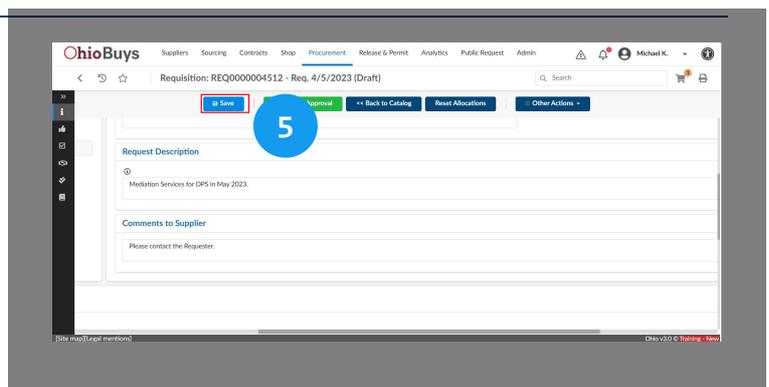


▲ Note

Users should include instructions on how to submit invoices in the Comments to Supplier field.

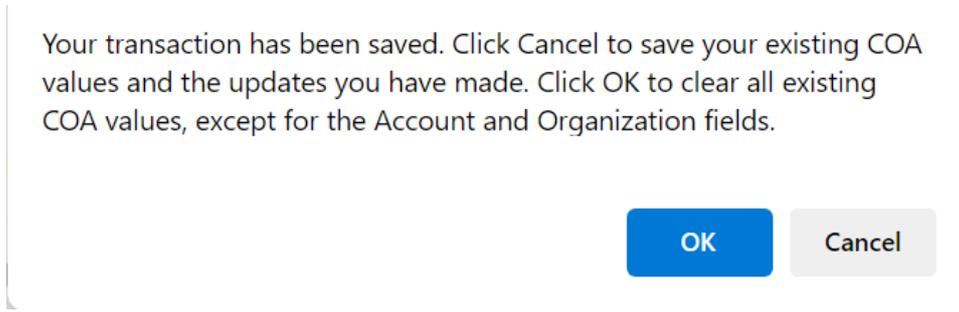
Save

5. Click **Save**.



▲ **Note**

Following the initial creation of the purchase requisition and adding any items to the cart, users will encounter the following pop-up message whenever they click **Save** or **Save & Close** on the purchase requisition Header:



- If you have not entered any Budget Information (i.e., chart of accounts codes) on the purchase requisition line item(s), or if you would like to erase all previously entered Budget Information across all line items, click **OK**.
- If you have already entered Budget Information, or would like to retain the existing budget information that was used on the line items (e.g., a duplicated PR or a change order) click **Cancel**.

Additional Purchase Requisition Options

The following options can be found in the collapsible menus below the purchase requisition header. They are not mandatory, but can be applied to your purchase requisition when appropriate:

▼ **Additional Agency Approvers**

- **Additional Agency Approvers:** Users can optionally choose to add additional approvers who will be the first to review their purchase requisition. If the user selects multiple users in this field, all of them will need to approve the requisition before it moves forward. Additional Agency Approvers, if applied, are generally the only approvers that might need to approve a Pcard purchase before it becomes a purchase order.

▼ **Purchasing Options**

Single Source Put PR On Hold? Do Not Encumber Sudden and accidental direct physical damage to property? ⓘ

Sole Source

[Request DAS to Source](#)

- **Purchasing Options:** From this section, you can indicate if a DAS sourcing event is required, as well as if the purchase requisition is Single Source or Sole Source. In addition, you can also note if the purchase requisition should be put on hold, and/or if it should not be encumbered. Indicate any relevant selections using the associated radio buttons.

▼ **Attachments - Internal, Supplier, and Justification ⓘ**

[Add Attachment](#)

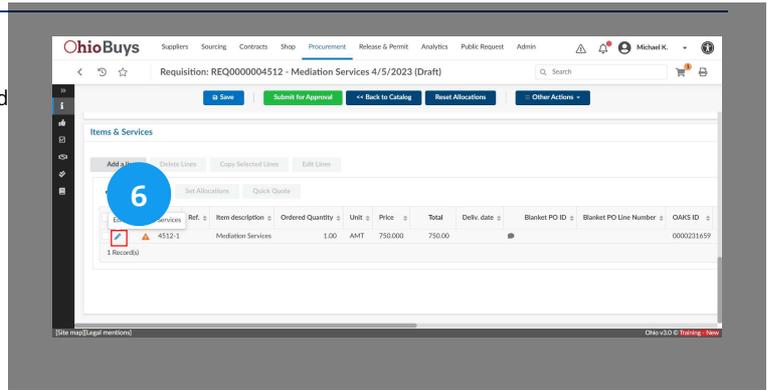
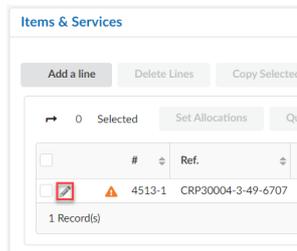
Keywords

 [Search](#) [Reset](#)

- **Attachments - Internal, Supplier and Justification:** By clicking the **Add Attachment** button users can upload documentation relevant to the purchase requisition. In certain cases, uploading justification documentation may be required to submit the purchase requisition.
 - *Internal Attachments:* Documentation, visible to State users, kept with the purchase requisition (e.g., internal emails, Supplier quotes) helpful for future reference or approvals.
 - *Justification Documents:* Documentation that can help clear some quoting alerts or otherwise explain the rationale behind why a purchase is being made (e.g., justifying why the chose supplier is selected on the requisition).
 - *Supplier Documents:* Documentation sent to the Supplier with the purchase order.

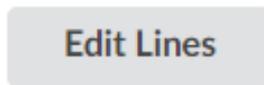
Line Items

6. Line items can be found at the bottom of the purchase requisition. Click the **Pencil** icon to review the line item details and make updates as needed.



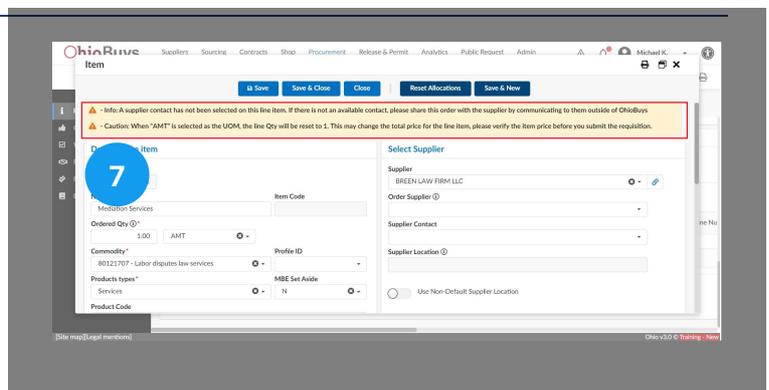
▲ Note

If there are multiple line items that require updates, users can make bulk edits by clicking the **Checkbox** () icon(s) and then clicking the **Edit Lines** button.

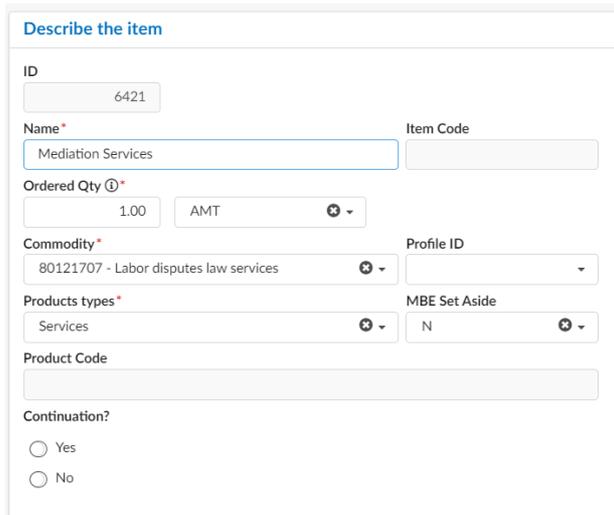


Line Item Alerts

7. The line item information is displayed. Additional alerts may appear on the line item to guide users on how to fill out the line item fields.



When reviewing the line item details for an individual line item, you can update information in the following sections:



Describe the item

ID: 6421

Name: Mediation Services | Item Code: []

Ordered Qty: 1.00 | AMT: []

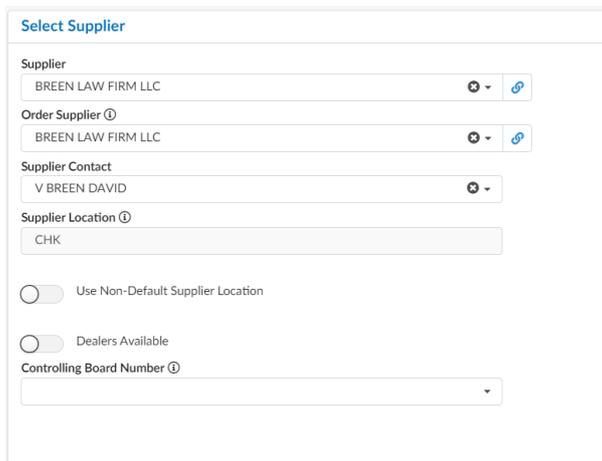
Commodity: 80121707 - Labor disputes law services | Profile ID: []

Products types: Services | MBE Set Aside: N

Product Code: []

Continuation?
 Yes
 No

Describe the Item: You are able to update the Ordered Quantity and Delivery Date fields as needed. Users can also use the MBE Set Aside field to indicate if the item qualifies as an MBE Set Aside purchase (note that this field will be automatically checked if the item is from a contract where Market Type = MBE or if the item was associated to an MBE Set Aside solicitation).



Select Supplier

Supplier: BREEN LAW FIRM LLC

Order Supplier: BREEN LAW FIRM LLC

Supplier Contact: V BREEN DAVID

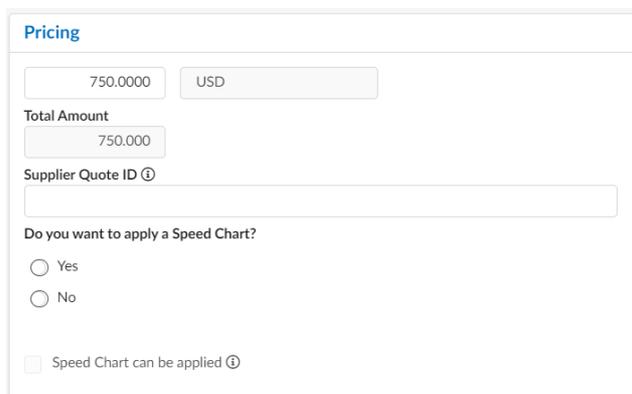
Supplier Location: CHK

Use Non-Default Supplier Location

Dealers Available

Controlling Board Number: []

Select Supplier: In some scenarios, you can select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. Note that when making purchases referencing certain contracts, the Order Supplier field will populate automatically. You should also update the Supplier Location field according to the information that Supplier has listed in OAKS.



Pricing

750.0000 | USD

Total Amount: 750.000

Supplier Quote ID: []

Do you want to apply a Speed Chart?
 Yes
 No

Speed Chart can be applied

Pricing: You are able to adjust the price for hosted and punchout catalog items, as needed. Whenever you adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document. The price can also be adjusted after conducting a quick quote within OhioBuys. Please refer to the [Create and Release a Quick Quote Solicitation Job Aid](#) for instructions on how to conduct a quick quote.

Define delivery place

Ship to

Ship to

P005432 DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X
BRECKSVILLE

DPS INVESTIGATIVE UNIT
6650 W SNOWVILLE RD SUITE X
44141 BRECKSVILLE
Ohio
UNITED STATES

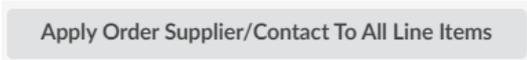
Define Delivery Place: If desired, you can define a different delivery place for each item.

▲ Note

If there is a need to update the Order Supplier, Supplier Contact, and Delivery Date fields across multiple line items, users should input these fields on the first line item, then click **Save**.



After saving, click Apply Order Supplier/Contact To All Line Items to automatically update the Order Supplier, Supplier Contact, and Delivery Date for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.

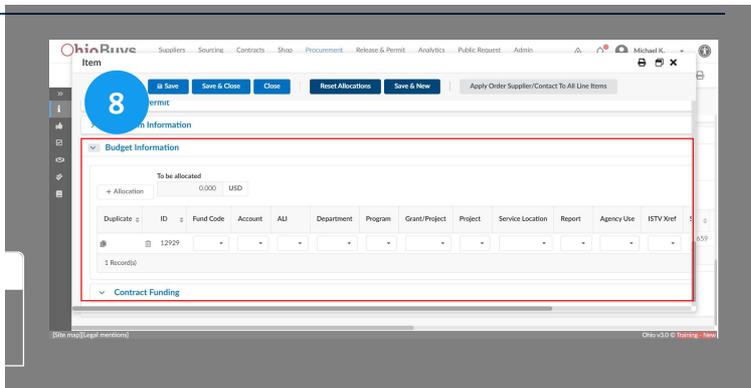


Chartfields

8. If there is a need to apply chartfields, users can do so by scrolling to the the bottom of the line item, and expanding the **Budget Information** collapsible header. For more information on chartfields, please refer to Entering Chartfield Information.

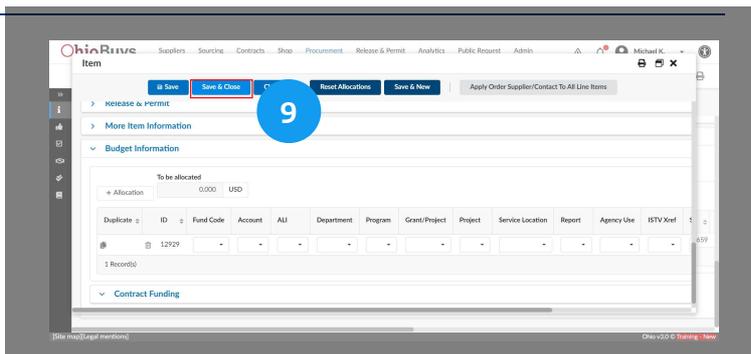
▲ Note

Chartfield information can also be updated across multiple line items using the Edit Lines button.



Save & Close

9. Click **Save & Close**.

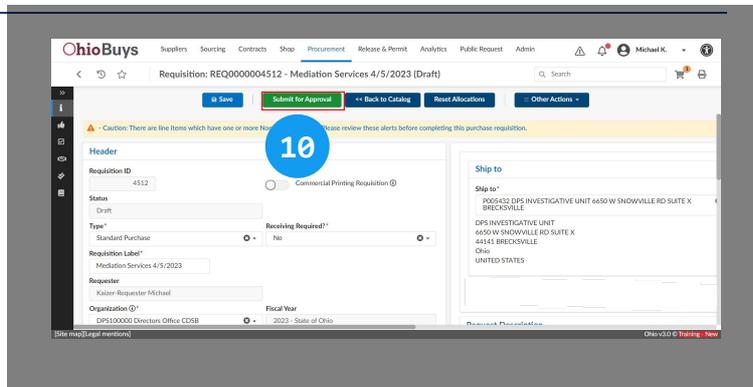


▲ Note

As a reminder, when making any updates to the requisition Header following the addition of any line item chartfield information, please be aware of the pop-up window that appears when saving. Click **OK** only if you intend to remove all chartfield information from the line items. Otherwise, click **Cancel**.

Submit for Approval

10. Continue making updates to any remaining line items as outlined in the previous steps. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit for Approval**.



▲ Note

In some scenarios, a Requisitioner or Quick Quote Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies. For more information, search for Quick Quotes and refer to the associated materials.

After the requisition has been submitted for review, users can check its approval status at any time.

If you would like to print the details of your requisition, click the Print () icon in the top right of the page.

To view the main agency approvers for your requisition, expand the Workflow Main Approvals section on the Header tab of the purchase requisition.

▼ Workflow Main Approvals

Purchase Requisition	Activity	Approval Type	Approved	Name	Order	Performed by	Validated on (UTC-5)	ID	Agency
Req. 2/23/2023	Procurement	37	<input type="checkbox"/>	Chapa Jarrod	10			1629466	DPS-Dept of Public Safety
Req. 2/23/2023	Procurement	37	<input type="checkbox"/>	Whalen Kelli	10			1629467	DPS-Dept of Public Safety
Req. 2/23/2023	Procurement	37	<input type="checkbox"/>	Drippos Jeffrey	10			1629470	DPS-Dept of Public Safety

3 Record(s)

On the Workflow tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.

You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

OhioBuys Submitting a Pcard Purchase

Updated: 03/28/2025 04:04 PM

Version: 14.0

Purpose & Profiles

This job aid covers submitting a Pcard purchase requisition within OhioBuys.

Profiles: Requesters, Requisitioners

Used When

Reference this when creating a purchase requisition that will be paid using a Pcard.

Note

The maximum transaction purchase amount using a Pcard is \$5,000, unless otherwise approved by the OBM Payment Card Administrator. If a user attempts to create a Pcard transaction in OhioBuys above \$5,000, the following blocking alert will be displayed: "Pcard Amount in excess of \$5,000." A Pcard purchase under the \$5,000 maximum will not require justification documents nor supplier quotes. Additionally, if a Pcard purchase under \$5,000 is submitted without adding any Additional Agency Approvers, it immediately becomes a Pcard order and is sent to the associated Supplier. Agencies should check with their Agency Admins to see when Additional Agency Approvers should be added.

Users from the Department of Transportation are able to create Pcard purchases over \$5,000 in certain cases. When creating a Pcard purchase, DOT users will see the Pcard Exception slider appear on the Header section of the purchase requisition.



Header

Requisition ID 143270	<input type="radio"/> Commercial Printing Requisition ⓘ
Status Draft	<input checked="" type="radio"/> Pcard Exception?
Type* Pcard Purchase	Receiving Required?*
	No

If the Pcard purchase is over \$5,000, DOT users should engage the Pcard Exception slider.

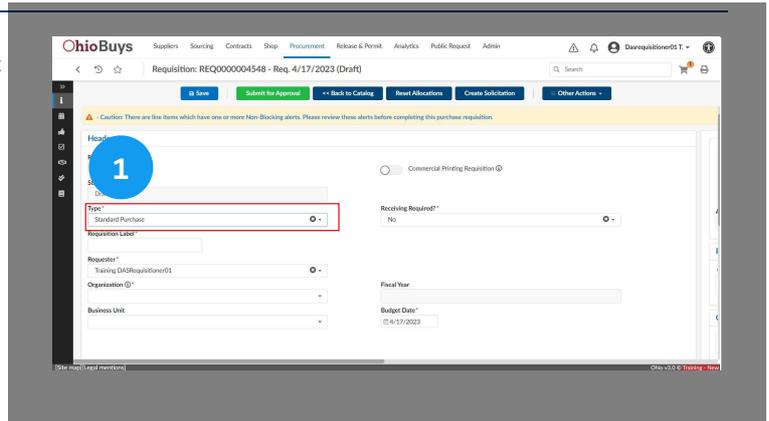


Complete the Purchase Requisition Header

1. After adding items to your shopping cart, begin the checkout process by updating the **Type** field to **Pcard Purchase**.

Type*

- Standard Purchase
- Pcard Purchase**
- Schedule Lines
- Emergency Purchase
- After the Fact Purchase
- Non-State After the Fact
- Direct PO
- Non-State PR
- Blanket/Encumbrance Order
- Non-Standard Purchase



Purchase Requisition Header Information

Header

Requisition ID: 4568 Commercial Printing Requisition ⓘ

Status: Draft

Type*: Standard Purchase ⌵ Receiving Required?*: No ⌵

Requisition Label*:

Requester: Kaizer Mike

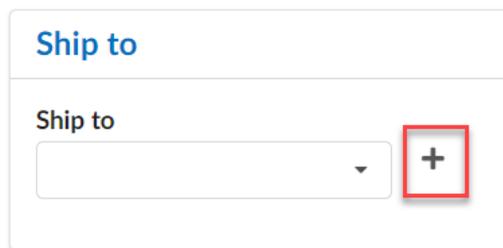
Organization ⓘ*: DPS100000 Directors Office CDSB ⌵ Fiscal Year: 2023 - State of Ohio

Business Unit*: DPS01 - Dept of Public Safety ⌵ Budget Date*: 4/21/2023

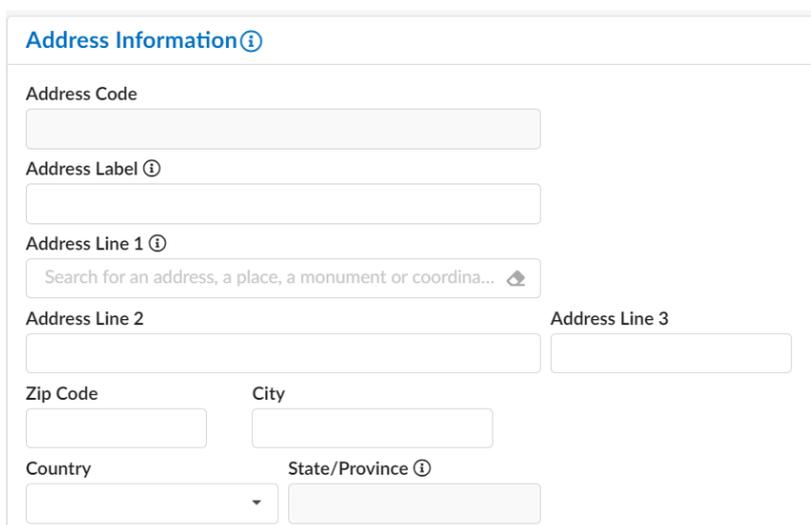
- Enter the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials.
- Select your **Organization**, which is the department or division of your agency that this requisition is for. Selecting your **Organization** will also automatically populate the **Business Unit** field.
- Indicate if you would like receiving to be required in OhioBuys.
- Select the requisition's **Ship To** address. The **Bill To** address will be automatically updated with the Pcard billing address after the purchase requisition type has been updated.
- Update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.
- If necessary, enter and select any **Additional Agency Approvers**. If multiple Additional Agency Approvers are selected, all of these users will need to approve your purchase requisition before it is processed into a purchase order.

▲ Note

- The Ship To field will automatically populate if users have set up the Default Settings on their profiles for this field.
- OhioBuys will only display options for the Ship To field that are registered with the State. Users can request to have an order shipped to an ad-hoc shipping address by clicking the + icon, and manually entering the address information.



- Enter the Address Label (a nickname for the address), Address Line 1, City, State/Province, Zip Code, and Country. Then click **Save & Close**.



- Address autocomplete is available when typing an address into Address Line 1, so addresses will be automatically suggested based on what has been entered into the field.
- Users **must** remember to complete the country field when using a one-time delivery address.
- After you have added the one-time delivery address, you must select it from the drop-down menu in the **Ship To** field. To do this, enter the Address Label for your address and then select the associated address from the drop-down menu. Note that each new addresses created in this manner will have ADHOC in front of it.
- When using a one-time shipping address, the purchase will be routed for additional approval by the users Agency Admin.

DOT Note

When creating a Pcard purchase for DOT, additional mandatory and optional fields will appear on the purchase requisition Header. After completing the Organization field, the following fields will become visible in the **DOT** section:

▼ **DOT**

DOT District*

DOT County*

DOT Project Number

DOT Agreement

PID

ITPR Number

- **DOT District** (mandatory): Select your district or division as appropriate from the drop-down menu.
- **DOT County** (mandatory): Select the appropriate DOT County from the drop-down menu. This selection should correspond with the county associated with the items being purchased, and is not necessarily the Pcard holder's own home county.
- **DOT Project Number**: If appropriate, type to enter your DOT Project Number in this field.
 - *If the requisition will have one of the following report codes : **LBM7, LBP7, LBN7, 4BR7, or 4AC7** then the **Project Number** field will become a mandatory field. If a project number starts with **F**, then the project code (COA field) has to be **CONV**. If the project number starts with anything else then the project code needs to match the project number. (Project Number 010070/Project Code DOT-010070)*
- **DOT Agreement Number**: If appropriate, type to enter a DOT Agreement number.
 - *This field will be for Personal Service Agreements, and users will obtain the agreement number outside of OhioBuys.*
- **PID**: If appropriate, begin entering the PID number and then select it from the drop-down menu when it appears.
 - *Selecting a PID number will populate a **State Job Number** in the Chart of Accounts (COA) information for the requisition.*
- **ITPR Number**: If appropriate, type to enter the ITPR number. An IT PR Number will be required if an IT Account Code is used.

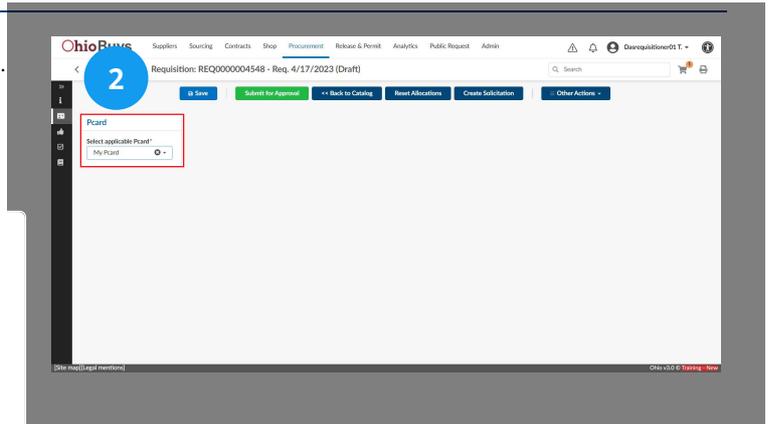
For more information on completing the purchase requisition header and chartfields for DOT, please refer to the materials linked below:

[Completing Checkout for a DOT Purchase Requisition](#)

[Entering Chartfield Information on a DOT Purchase Requisition](#)

Select Pcard

2. Select your Pcard after navigating to the Pcard functional tab. The selected Pcard will be the one used for the billing of the purchase requisition.

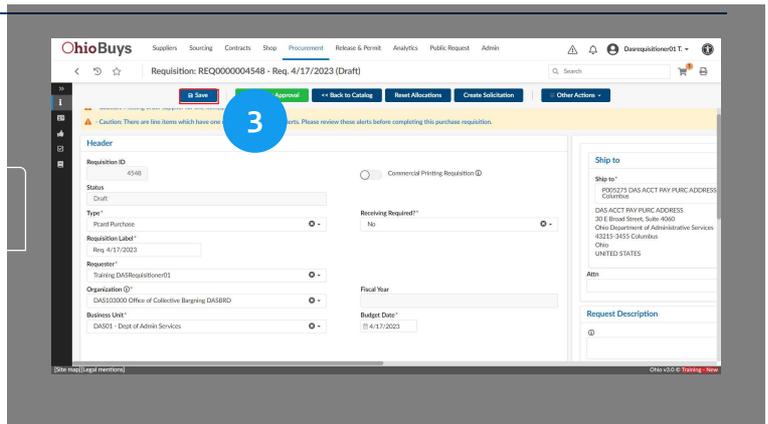


▲ Note

If a user only has one Pcard this field will be automatically populated. If a user has more than one, the user will have to select the card from the dropdown menu. Refer to the User Options asset to find more information on how to add a pcard to your user profile.

Save My Requisition

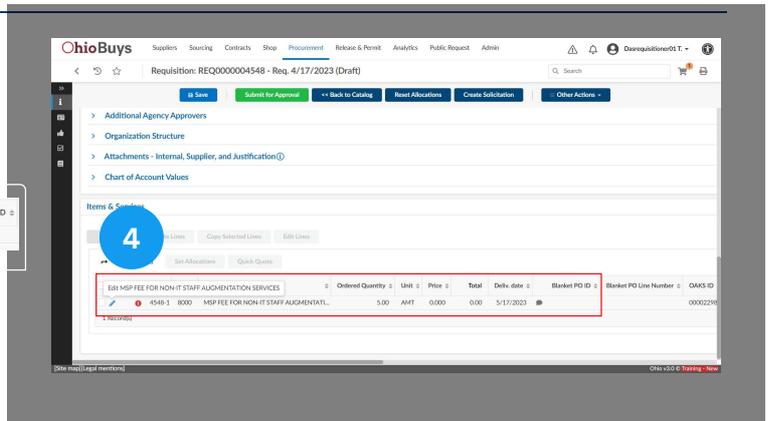
3. Click **Save**.



Update Line Item Information

4. Open the line item by clicking the the **Pencil** icon to edit the line item details and resolve any blocking or nonblocking alerts.

Item Description	Ordered Quantity	Unit	Price	Total	Deliv. date	Blanket PO ID
Edit MSP FEE FOR NON-IT STAFF AUGMENTATION SERVICES	5.00	AMT	0.000	0.00	5/17/2023	



Item

Save
Save & Close
Close
Reset Allocations
Save & New

Action Required: The "Order Supplier" field is missing for this item. Please update this line item with the dealer or supplier who will fulfill this order.

Info: A supplier contact has not been selected on this line item. If there is not an available contact, please share this order with the supplier by communicating to them outside of OhioBuys

Caution: When "AMT" is selected as the UOM, the line Qty will be reset to 1. This may change the total price for the line item, please verify the item price before you submit the requisition.

Describe the item

ID: 6477

Name: MSP FEE FOR NON-IT STAFF AUGMENTATION SERVI...
Item Code: 30193

Ordered Qty: 1.00
UOM: AMT

Commodity: 80111600 - Temporary personnel services
Profile ID: [dropdown] Fixed Asset

MBE Set Aside: N

Type: Product

Delivery Date: 5/18/2023

Product Code: CSP900917-1

Continuation?

Select Supplier

Supplier: INGENESIS INC

Order Supplier: [dropdown]

Supplier Contact: [dropdown]

Supplier Location: [dropdown]

Use Non-Default Supplier Location

Dealers Available

Controlling Board Number: [dropdown]

- Select the **Order Supplier** and **Supplier Contact**. Note that the Order Supplier field is mandatory when submitting a Pcard purchase.
- If desired, select/update the **Delivery Date**.
- Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier, Supplier Contact, Delivery Date, and Attn for all line items from that Supplier. This will have no effect on other line items that are from different Suppliers.

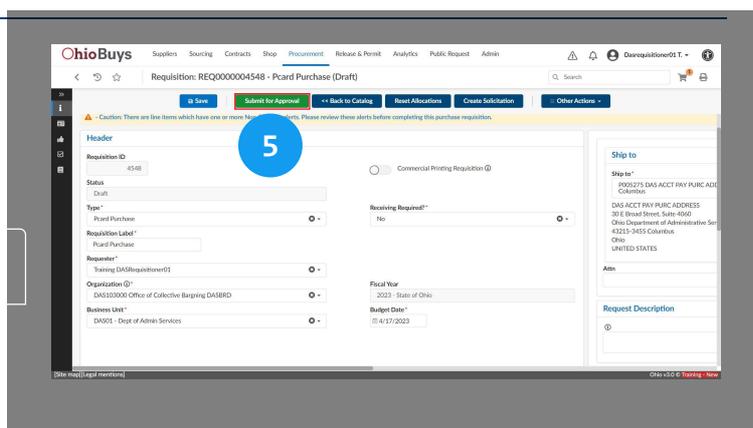
Note

Chartfield information is not required for Pcard purchases unless directed by your agency. Please consult with your agency admin to confirm whether or not your Pcard purchases require chartfield information.

Submit Pcard Purchase Requisition

5. When you have successfully completed all mandatory and optional fields, as well as resolved any applicable alerts, click **Submit for Approval**.

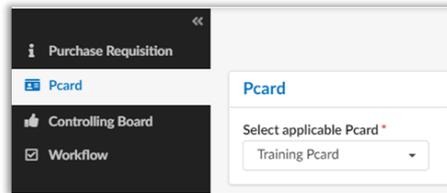
Submit for Approval



▲ Note

In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies.

If a user has multiple Pcards, they will need to select which one should be applied prior to submitting the requisition. The Pcard can be selected on the Pcard tab.



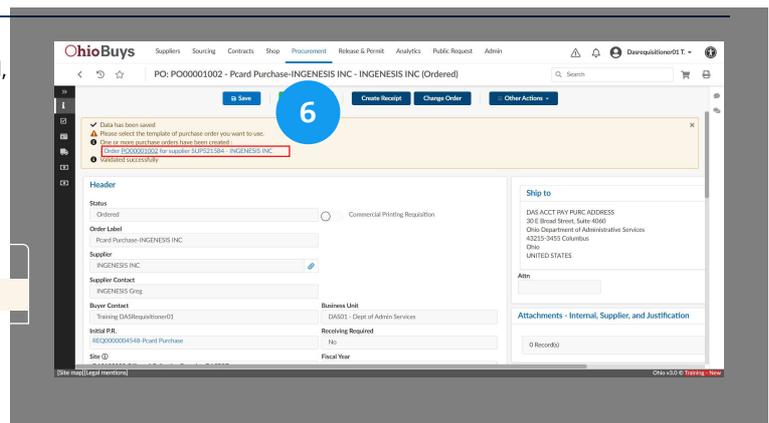
Please refer to [Creating a Quick Quote Solicitation](#) for more details on the quick quote process.

[Creating a Quick Quote Solicitation](#)

View My Purchase Order

6. Unless any Additional Agency Approvers have been assigned, the purchase order will be created. Click the hyperlink to open the associated purchase order within OhioBuys.

[Order PO00001002 for supplier SUP521584 - INGENESIS INC](#)



▲ Note

If you would like to print the details of your requisition, click the Print icon in the top right of the page.

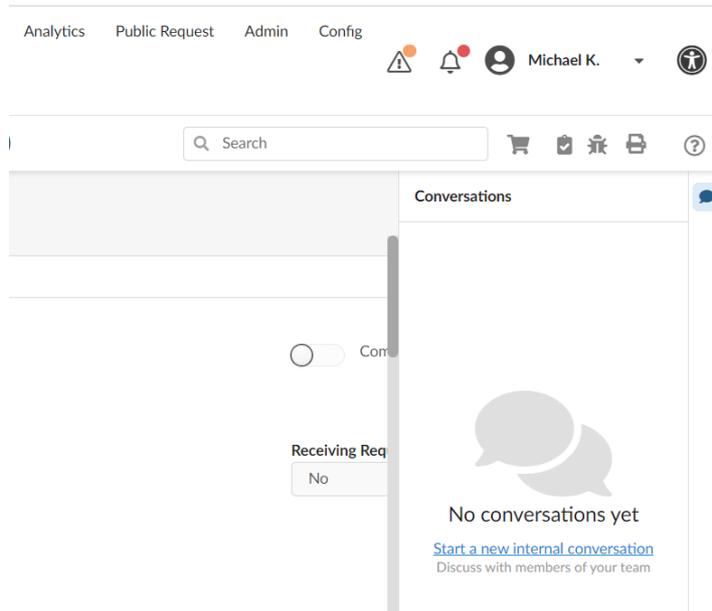
On the Workflow tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.

If no Additional Approvers are added, and the purchase is below the Controlling Board Threshold, then a Pcard order will be automatically generated for the purchase requisition.

You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

▲ **Note**

If you have questions and/or comments regarding a purchase requisition, click the Conversation Thread () icon to use the messaging functionality and communicate with another State user, or click the Supplier Conversation Thread () icon to communicate with both State users and the Supplier directly in the exception.



Please refer to the **Using the Notification Bell and Messaging in OhioBuys** for more information on how to use the messaging feature.

Using the Notification Bell and Messaging in OhioBuys

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

OhioBuys Completing Chartfield Information

Updated: 03/26/2025 07:27 PM

Version: 6.0

1 Purpose & Profiles

This job aid covers the process for reviewing and entering chartfield information on a purchase requisition in OhioBuys.

Profiles: Requester, Requisitioner, Agency Procurement Approver, Agency Fiscal Approver

Used When

Reference this when there is a need to either add new chartfield information, or review existing chartfield information on a purchase requisition.

During the checkout process, Requesters, Requisitioners, and Agency Procurement Approvers, and Agency Fiscal Approvers can enter chartfield information for each line item. Requesters, Requisitioners, and Agency Procurement Approvers are not required to enter chartfield information; however, this information becomes mandatory at the Fiscal Agency Approver step of the Purchase Requisition approval workflow.

Chart of Account Values

1. Chartfield information can be found at the bottom of a purchase requisition. To view any chartfield information that has already been applied, click to expand the **Chart of Account Values** section on the requisition header.

> [Chart of Account Values](#)

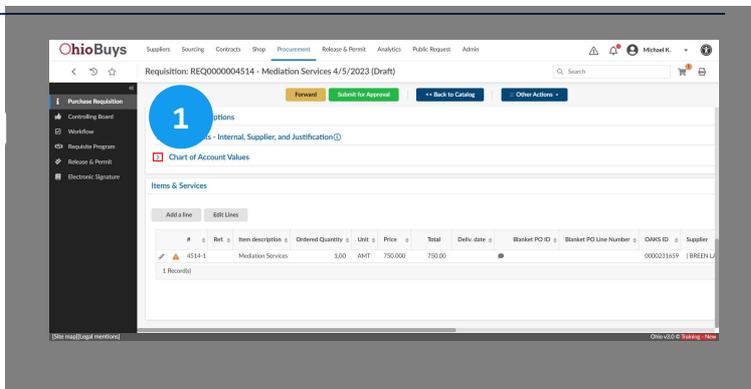


Chart of Account Values Table

2. Chartfield information associated with the line items is displayed.

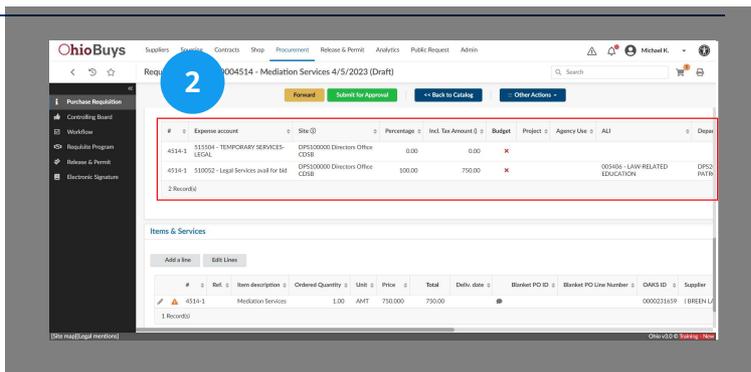


Chart of Account Values

#	Expense account	Site	Percentage	Incl. Tax Amount ()	Budget	Project	Agency Use	ALI
4514-1	515504 - TEMPORARY SERVICES-LEGAL	DPS100000 Directors Office CDSB	66.67	500.00	✗			019606 - LEGAL SERVICES CORPORATION
4514-1	510052 - Legal Services avail for bid	DPS100000 Directors Office CDSB	33.33	250.00	✗			005406 - LAW-RELATED EDUCATION
2 Record(s)								

- The # column will correspond to the # column that appears on the Items grid, and denotes different line items

Open Line Items

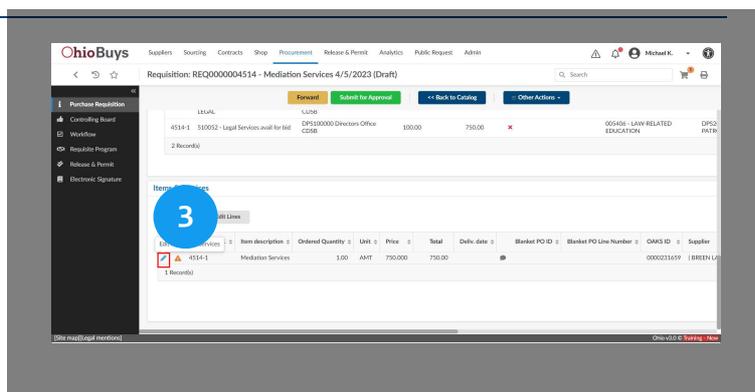
3. To view the chartfield information on a line item, or to add additional chartfield information, click the **Pencil** icon.

Items & Services

Add a line Edit Lines

#	Ref.	Item description	Ordered Quantity	Unit
4514-1		Mediation Services	1.00	AMT

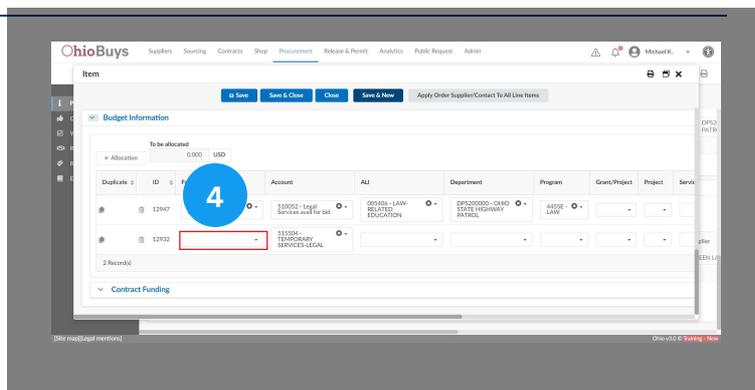
1 Record(s)



Enter Chartfield Information

4. The chartfield information is displayed at the bottom of the Item pop-up window within the **Budget Information** section. Click one of the displayed fields to add or edit chartfield information.

Duplicate	ID	Fund Code
	12947	<input style="border: 2px solid red;" type="text"/>



Duplicate	ID	Fund Code	Account	ALI
	12947	grf GRF - GENERAL REVENUE	510052 - Legal Services avail for bid	005406 - LAW-RELATED EDUCATION
	12932	See All	515504 - TEMPORARY SERVICES-LEGAL	019606 - LEGAL SERVICES CORPORATION

To add chartfield information to the selected field, begin typing information. OhioBuys will automatically provide options based on your inputs. Once you have located your desired chartfield, select it from the drop-down menu.

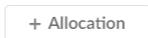
▲ Note

User **must** select the chartfield from the drop-down menu (e.g., if you just type GRF in the Fund field and then tab over to the next field, the value will not be populated in the field).

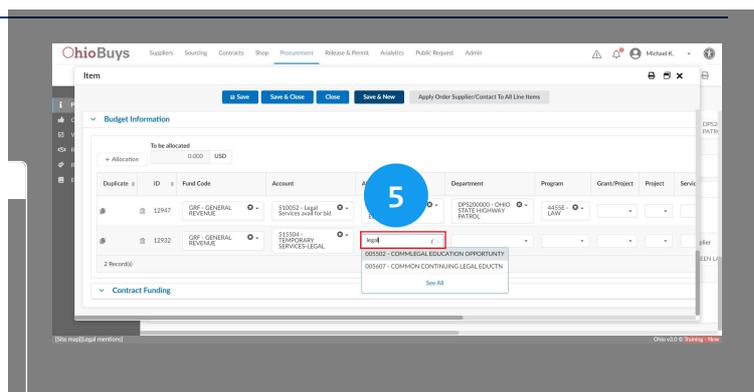
Remaining Chartfields

5. Repeat these steps to populate the remaining fields.

▲ Note



Additional chartfield lines can be added by clicking the + Allocation button. Users can also copy existing chartfield lines using the **Duplicate** () icon, or delete lines using the **Trashcan** () icon.

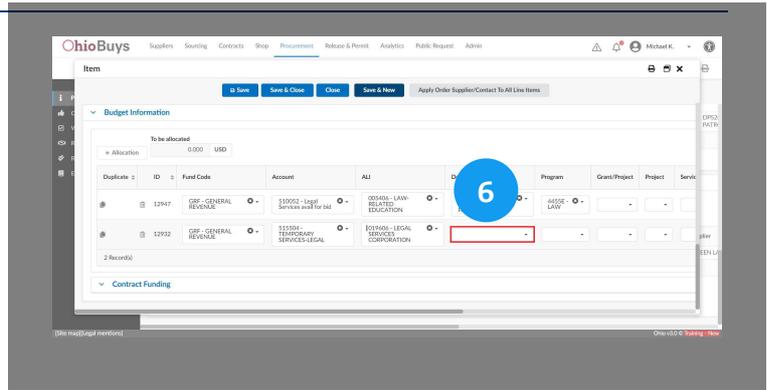


▲ Note

- The **Account** field will populate automatically based on the item. Users may still need to manually update the Account field
- Whenever you are purchasing from an **ISTV** account, you need to select the correct account code in the Account field instead of the default code that is populated in the chartfield information

Department Field

6. The **Department** field is unique and will only automatically display options that the user has added to their Favorite Departments on their profile.



Adding Non-Favorite Departments

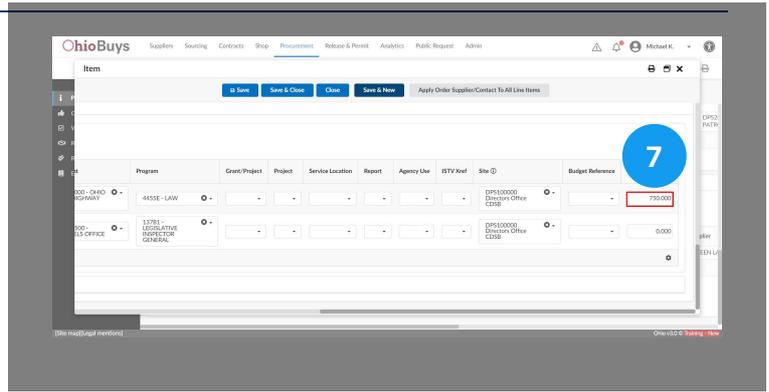
To apply a Department field not listed in a user's Favorite Departments, click **See All**.

Clear the Favorite Departments filter by clicking the X icon. Then search for the correct department using the Keywords search, and select it using the **Checkbox** () to its left.

Split Allocations

7. After adding appropriate chartfield information, scroll to the right to split the chartfield allocations.

ISTV Xref	Site	Budget Reference	Incl. Tax Amount (USD)
	DPS100000 Directors Office CDSB		750.000
	DPS100000 Directors Office CDSB		0.000



▲ Note

How a user allocates their chartfields will depend on the UOM selected for the line item.

- Items with a UOM of **AMT** will only display the option to make allocations by Amount in the **Incl. Tax Amount (USD)** field.
- Items with any UOM that is **NOT AMT** should be allocated using the **Percentage** field. Note that the Percentage field is not visible on line items with a unit of AMT.

Site	Budget Reference	Percentage	Incl. Tax Amount (USD)
ADJ112030 Admin Support Services BEAR		51.00 %	1,326,051.000

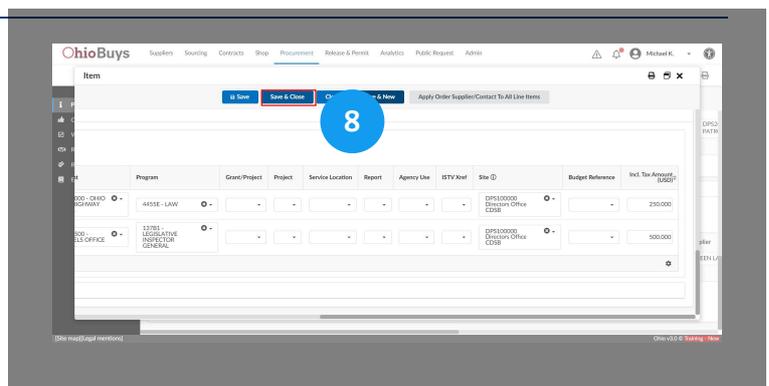
- OhioBuys allows allocations with a degree of precision up to 1/100th of a percent, and when allocating by amount, will round up or down to the nearest 1/100th of a percent.

Unallocated Percentage	Remaining Quantity to be Allocated
1.00	0.0100

- For items with a unit of measure other than AMT, a table displaying the remaining percentage/quantity to be allocated is visible at the top of the Budget Information section.

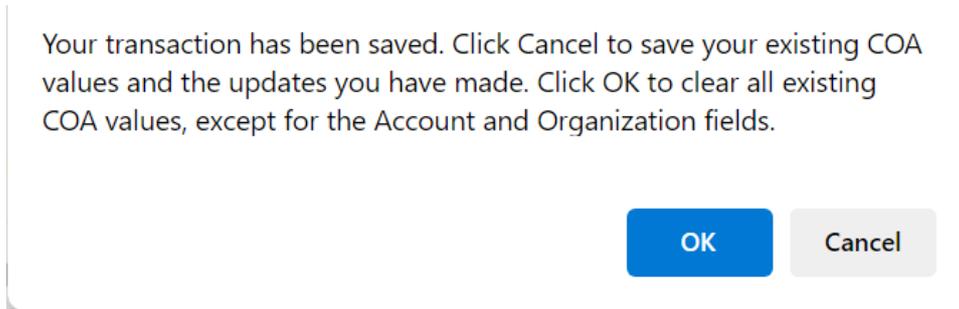
Save & Close

8. After completing necessary updates to the chartfields, click **Save & Close**. Repeat this process for any additional line items as appropriate.



▲ Note

Users will encounter the following pop-up message whenever they click **Save** or **Save & Close** on the purchase requisition Header:



- In most cases, after entering chartfield information on the purchase requisition users should click **Cancel** in this pop-up.
- Users should only click **OK** if they intend to erase all previously entered chartfield information across all line items on the purchase requisition.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Ohio OhioBuys Creating a PAY01 Purchase Requisition

Updated: 03/26/2025 07:30 PM

Version: 6.0

1 Purpose & Profiles

This job aid covers the process for creating and submitting a PAY01 purchase requisition.

Profiles: Requesters, Requisitioners

Used When

Reference this when creating a purchase requisition utilizing the PAY01 Business Unit.

▲ Note

If you are creating a PAY01 purchase requisition, you must manually make this indication when completing the checkout process in Ohio Buys. The PAY01 Business Unit will not default when creating the purchase requisition.

Changing the Business Unit

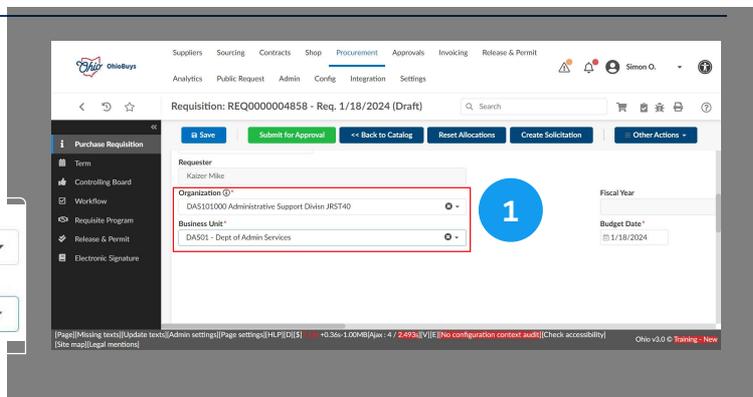
1. On the Header section of the Purchase Requisition page, navigate to the **Business Unit** field.

Organization ⓘ*

DAS101000 Administrative Support Divisin JRST40

Business Unit*

DAS01 - Dept of Admin Services

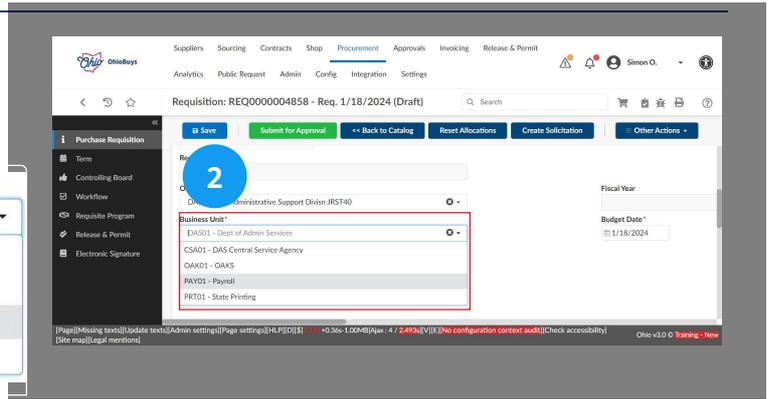


Selecting PAY01-Payroll

2. Select **PAY01-Payroll** from the drop-down menu.

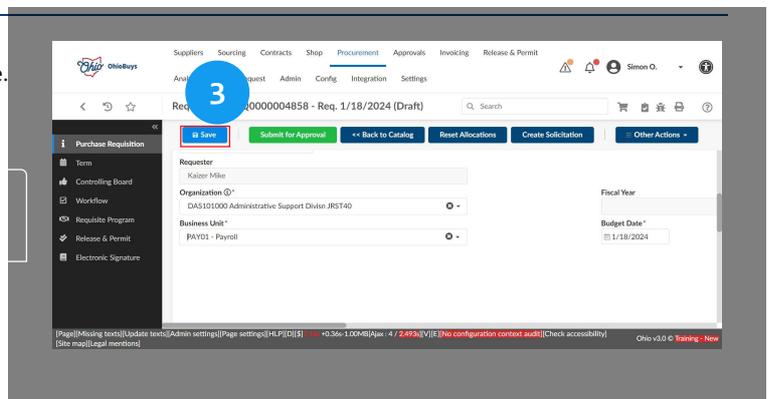
Business Unit*

- DAS01 - Dept of Admin Services
- CSA01 - DAS Central Service Agency
- OAK01 - OAKS
- PAY01 - Payroll**
- PRT01 - State Printing



Save Updates

3. Click **Save**. Complete the purchase requisition as appropriate.

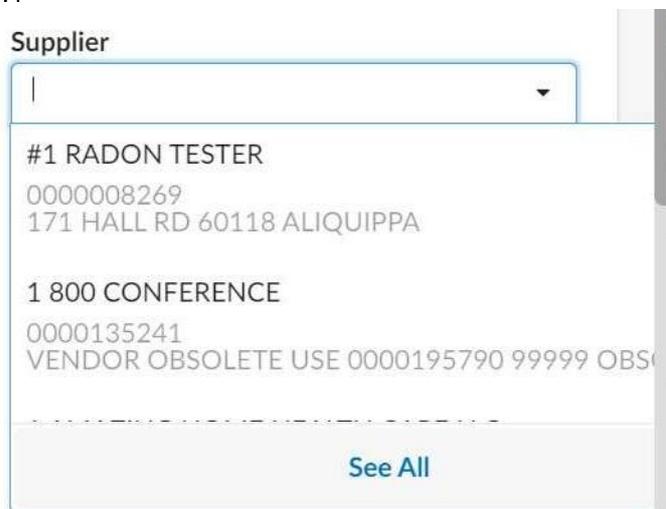


▲ **Note**

For Freeform line items for a PAY01 purchase requisition, additional steps are required. Click on the pencil icon for the line item.

Pencil Icon : 

Click **See All** underneath the **Supplier** field of the line item.



Select **OHALL** to change the **Set ID** filter from State to OHALL.



Click **Search**. Suppliers will now be properly filtered for **PAY01** purchases.



After **PAY01** addition, complete the remainder of the requisition normally.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771
OR OBM.ContactCenter@obm.ohio.gov.

Additional Purchasing Notes

Topics

- Note on Continuation Purchases
- Note on Negative Line Items
- Note on Release & Permit Purchases

Note on Continuation Purchases

Guidance for Flagging Continuation Purchases

The screenshot shows a form with the following fields:

- Delivery Date ***: A date picker showing 3/22/2023.
- Product Code**: An empty text input field.
- Continuation Comment**: A large text area for entering comments.
- Continuation Order**: A dropdown menu.
- Continuation?**: A section with two radio buttons: Yes and No. This section is highlighted with a red box.

If a purchase is a continuation of a previous purchase off of an STS contract, users must indicate this on the line item(s). Click **Yes** in the **Continuation?** field on each line item that is part of a continuation purchase. This will allow you to enter any relevant comments in the Continuation Comments field.

If the previous purchase was made in OhioBuys, search for the PO number in the **Continuation Order** field and select it from the drop-down menu. Then click **Save**.

- Users should also attach any supporting documentation referencing the original solicitation and/or purchase in the **Attachments** section on the purchase requisition header.
- A continuation on a purchase originating from an STS contract where the initial solicitation and purchase were made outside of OhioBuys will not show up in the Continuation Order field. This will cause the new PR to show up on the STS exception report.
- Classifying a purchase as a continuation will not allow an agency to bypass the STS purchase requirement that requires the solicitation of multiple suppliers.

Note on Negative Line Items

Guidance for Handling Negative Line Items

In OhioBuys, purchase requisition line items cannot have a negative dollar value. If a line item has a negative value, the purchase requisition will not be able to be processed into a purchase order.

Users should keep the following points of guidance top of mind when faced with negative line items:

- Under no circumstances should a user create freeform line items with a negative dollar value.
- If a user receives a quote for a negative line item from a Supplier, the user should adjust the price of a positive line item accordingly by the given negative dollar amount and include a note about the discount in the "Comments to Supplier" field. The user should not import or use the negative line item by itself in that purchase requisition.

- If a user encounters a negative line item when browsing a hosted catalog, they should submit a helpdesk ticket and include the contract number tied to that negative line item. The associated Contract Analyst for that contract will then work with the Supplier to correct and update the catalog item.

Note on Release & Permit Purchases

Guidance for Creating Release & Permit Purchases

A Request to Purchase (RTP) should be created to place IT and non-IT sourcing and contracting requests with the DAS Office of Procurement Services (OPS).

Purchases from a State contract established by the Office of Procurement Services (OPS) do not require an RTP.* If an agency is attempting to purchase items off an existing OPS State contract or making a purchase from a Requisite Procurement Program (e.g., OPI), they can proceed directly to creating a PR.

*Except for services being requested under the Third-Party Administrator (TPA) for Facility Maintenance and Repair Projects contract (Index # GDC160 Contract #CSP905120-1) and competitive selection two phase prequal contracts, in which case an RTP is required.

Non-IT Purchases

If an agency is making a purchase that does not reference an existing OPS State contract, consider the total dollar amount of the purchase need. For purchases that do not reference an OPS State contract, users should proceed directly to creating a PR if the total value of the purchase need less than \$50,000.

If the purchase does not reference an OPS State contract and the total value of the purchase need is above these dollar thresholds, agencies are required to submit a RTP to start the purchasing process. In addition, if the total value of the purchase would result in your agency's Direct Purchase Authority (DPA) being exceeded with a particular supplier, an RTP is required.

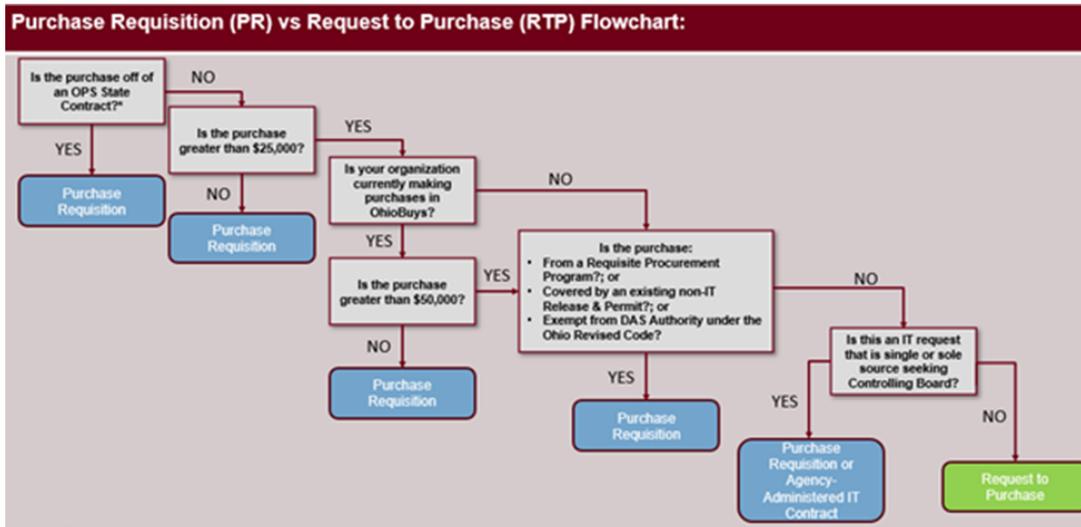
There are a few exceptions to these guidelines. An RTP is not required if the purchase is covered by an existing non-IT Blanket Release & Permit (R&P), or if the purchase is exempt from DAS authority under the Ohio Revised Code.

IT Purchases

If an agency is making an IT purchase that does not reference an existing OPS State contract and need an IT R&P, the following needs to be considered:

1. Sole or Single Source – create either a PR referencing an IT account code or Agency-administered contract using the IT checkbox to identify the contract as IT.
 - a. Attach supporting documentation and include the draft Controlling Board request if using Controlling Board purchase authority, or documentation to demonstrate compliance with PM-01.
 - i. Create Agency-administered contract - agencies can create an agency-administered contract in OhioBuys, flag it as an IT contract using the IT checkbox and populate the Contract Not to Exceed field on the Negotiated Terms tab of the contract. If the agency is requesting biennium Controlling Board approval as part of this contract, select the Biennium Fiscal Year 1 and Biennium Fiscal Year 2 and then enter the Biennium Fiscal Year Amount for each fiscal year. Once the contract is submitted, it will automatically route for the necessary IT approvals (e.g., IT SIM, IT SME, EITC Analysts, etc.). After IT has completed their review, an IT R&P number will be generated and will be linked on the Release & Permit field on the header of the contract. The Contract Responsible user will receive an email notification once the necessary approvals have been received.
2. If an agency has a procurement need that is not on an OPS contract or is not provided via a sole or single source provider over \$50,000.00, an RTP must be submitted to determine the appropriate procurement method. For example, a Request for proposal, Invitation to Bid, new DAS contract, or IT agency-released solicitation.

Please reference the below flowchart to help determine whether a RTP is necessary for a purchase.



In the event that users start with a PR in OhioBuys, it will route through the appropriate requisition workflow and be assigned an R&P as a part of the PR workflow. In these cases, the PR will subsequently end up routing to the “DAS Released Requisition” step of the workflow. The requisitioner can add the Controlling Board Number while the PR is at this step, before submitting it to the Final Approver step.

If the agency creates an RTP or an IT agency-administered contract to obtain the release and permit, the agency can then create PRs at any time and reference their IT agency-administered contract or assigned R&P number and Controlling Board number (once the Controlling Board number is available in OhioBuys); however, expired R&Ps of all types cannot be selected on a PR. If an agency has an IT agency administered contract with an IT R&P, they can reference the contract on their line item and the system will automatically grab the R&P and bypass EITC reviews. In cases where the Controlling Board number is entered before reaching the “DAS Released Requisition” step, the workflow will bypass this step and the requisition will route to the Final Approver step.

Approving Purchase Requisitions

Topics

- Reviewing and Updating a Purchase Requisition (Requisitioners)
- Requester Supervisor - Approving a Purchase Requisition
- Additional Agency Approver - Approving a Purchase Requisition
- Agency Procurement Approver - Approving a Purchase Requisition
- Agency Fiscal Approver - Approving a Purchase Requisition
- Agency Final Approver - Approving a Purchase Requisition



OhioBuys Reviewing and Updating a Purchase Requisition

Updated: 03/27/2025 03:16 PM

Version: 9.0

1 Purpose & Profiles

This job aid covers the process of reviewing a purchase requisition submitted by a Requester and completing updates to it before submitting it for agency approval.

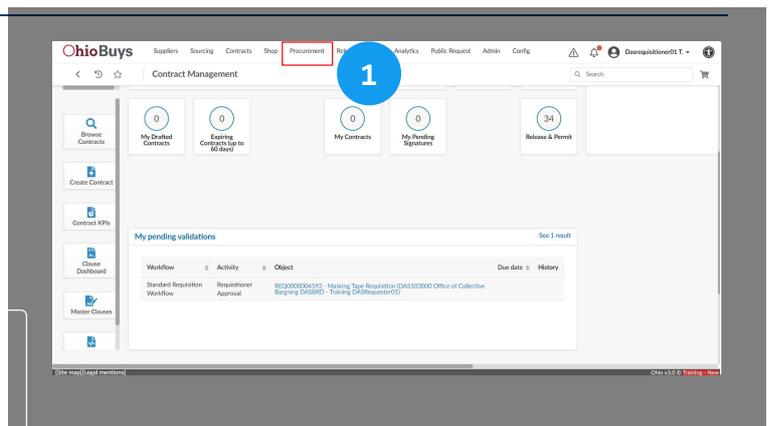
Profiles: Requisitioners

Used When

Reference this when reviewing and updating a purchase requisition.

Selecting My Requisition

1. Users will receive an email notification when they have a purchase requisition to review. It will also be visible on the OhioBuys homepage as an open workflow task in your **My Pending Validations** pane. To view all requisitions within your scope, click **Procurement** in the Main Menu Navigation Bar and select **Browse Requisitions** from the drop-down menu.

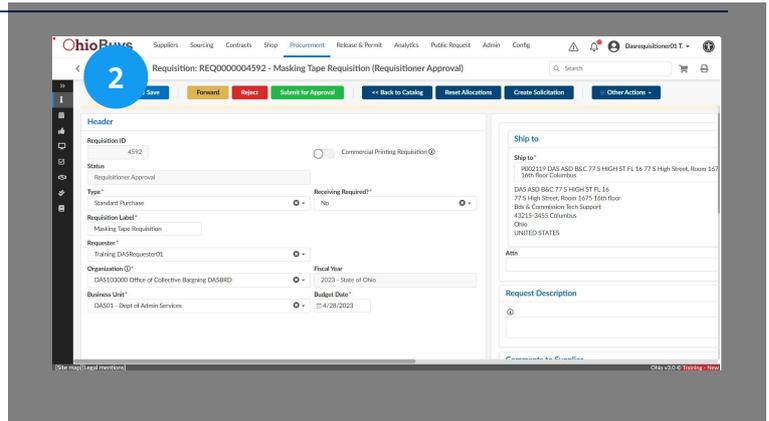


Procurement Approvals Invoic

- Browse Requisitions
- Create Requisition
- Requisite Program
- Browse Orders
- Pending Receipts
- Browse Receipts
- Create Receipt
- Browse Request To Purchase
- Create Request To Purchase

Review the Purchase Requisition

2. Review the contents of the purchase requisition **Header** section, and make updates as appropriate.



Reviewing the Purchase Requisition Header Information

As a Requisitioner, users can make updates to any field in the **Header** section as part of their review. Note that if a user updates the **Organization** field, they must click **Save** and then click **Cancel** on the subsequent pop-up window that is displayed.

The screenshot shows the 'Header' section of a purchase requisition form. It contains the following fields and values:

- Requisition ID:** 4592
- Status:** Requisitioner Approval
- Type*:** Standard Purchase
- Receiving Required?***: No
- Requisition Label*:** Masking Tape Requisition
- Requester*:** Training DASRequester01
- Organization ⓘ*:** DAS103000 Office of Collective Bargaining DASBRD
- Fiscal Year:** 2023 - State of Ohio
- Business Unit*:** DAS01 - Dept of Admin Services
- Budget Date*:** 4/28/2023

There is also a toggle switch for 'Commercial Printing Requisition' which is currently turned off.

If the purchase requisition should be a Pcard Purchase, Requisitioners can apply their own Pcard by clicking the **Type** field and selecting **Pcard Purchase**.

This image shows a close-up of the 'Type*' dropdown menu. The current selection is 'Standard Purchase'. The dropdown is open, showing 'Pcard Purchase' as an available option.

Scroll to the right of the purchase requisition to review the information in the **Ship To** and **Bill To** tabs. These tabs include the shipping address and the billing address your goods and/or services will be sent to, respectively. Review the information in the **Request Description** tab. This tab includes information related to the requisition. Review the information in the **Comments to Supplier** tab. This tab includes comments for the supplier.

Scroll down and, if required, select and Additional Agency Approvers who will need to review the purchase requisition. Note that only one of the selected approvers needs to approve the purchase requisition for it to advance to a purchase order.

The screenshot shows the 'Additional Agency Approvers' section, which is currently collapsed. Below the section title is an empty dropdown menu for selecting approvers.

▲ Note

- Additional Agency Approvers are the only approvers that will act on the purchase if it is a Pcard purchase
- If you are unsure who these approvers should be, please consult with your Agency Admin

Creating and Managing Purchase Requisitions in OhioBuys

Reviewing and Updating a Purchase Requisition

Scroll down on the purchase requisition to review the **Purchasing Options** and **Attachments** sections. You can expand on the section by clicking on the associated header. The following Purchasing Options are available:

- a. **Single Source:** indicates that the purchase is from one selected supplier, even though there are other suppliers that provide similar products
- b. **Sole Source:** Indicates that the selected supplier is the only one that can adequately fulfill the need outlined in the purchase requisition
- c. **Put PR on Hold?:** If DAS Procurement review chooses not to release the procurement, they have the ability to put it on hold and do the procurement on behalf of the agency
- d. **Do Not Encumber:** Selecting this button will not encumber funds in OAKS for the purchase requisition; please note that if the Pcard slider is selected for a purchase requisition, this option will not be displayed and OAKS will automatically not encumber the purchase
- e. **Sudden and accidental direct physical damage to property?:** Indicates if the purchase is related to property damage, in which case the requisition will appear in a report sent to DAS Office of Risk Management

Purchasing Options

Single Source Do Not Encumber Put PR On Hold?

Sole Source Sudden and accidental direct physical damage to property? ⓘ

[Request DAS to Source](#)

The Attachments section will display any attached documents. To add additional documents, click **Add Attachment**.

Attachments - Internal, Supplier, and Justification ⓘ

[Add Attachment](#)

Keywords [Search](#) [Reset](#)

→ 0 Selected

Title	Att.	Contact
Rendering of Design		KAIZER Mike

1 Record(s)

Review/Update a Line Item

3. Scroll down to the **Items and Services** section to view the line item(s) associated with the purchase requisition, including any blocking or non-blocking alerts associated with that item. Click on the **Pencil icon** to update the line item and resolve the alerts.

OhioBuys Suppliers Sourcing Contracts Shop Procurement Release & Permit Analytics Public Request Admin Config

Requisition: REQ000004592 - Masking Tape Requisition (Requisitioner Approval)

[In Save](#) [Forward](#) [Reject](#) [Submit for Approval](#) [Back to Catalog](#) [Reset Allocations](#) [Create Substitution](#) [Other Actions](#)

Items & Services

Action Required: The "Order Supplier" field is missing for this item. Please update this line item with this supplier or dealer who will fulfill this order. The item may be available from a requisible program or mandatory contract. An order will be subject to requisible review, please select this item from a requisible program if possible. If a supplier contract has not been selected on this line item, if there is not an available contract please share this order with the supplier by communicating to the supplier via email.

Total	Deliv. date	Blanket PO ID	Blanket PO Line Number	OAKS ID	Supplier
1.00	5/26/2023			000004896	CNCINM11ASSC

1 Record(s)

Line Item Information

Describe the item

ID
6546

Name* Masking Tape, Utility, 2", 24 rolls per case Item Code

Ordered Qty* 1.00 Case

Commodity* 31201503 - Masking tape Profile ID Fixed Asset

Products types* Yes MBE Set Aside N

Delivery Date* 5/26/2023

Product Code

Continuation?
 Yes
 No

Review the information in the **Describe the Item** section. Here users can update the **Ordered Quantity**, **Commodity**, **Product Type** and **Delivery Date** fields as appropriate.

Select Supplier

Supplier
CINCINNATI ASSOCIATION FOR THE BLIND

Order Supplier ⓘ
CINCINNATI ASSOCIATION FOR THE BLIND

Supplier Contact

Supplier Location ⓘ

Use Non-Default Supplier Location

Dealers Available

Controlling Board Number ⓘ

Review the information in the **Select Supplier** section. Update the **Order Supplier** (i.e., the location from which the Supplier will ship the order) and the **Supplier Contact** as appropriate.

▲ Note

Determine whether the item is a catalog item or a freeform item. If the item is a freeform item, the **Product Code** and/or **Item Code** fields in the Describe the Item section will be blank.

More Item Information

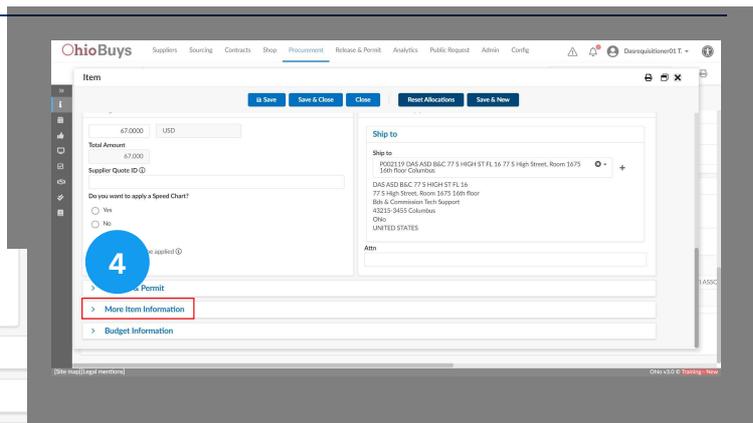
4. If the line item is a freeform item, users should confirm that there is not an appropriate alternative item available in the OhioBuys hosted catalog. Scroll down and expand the **More Item Information** header.

Speed Chart can be applied ⓘ

> Release & Permit

> **More Item Information**

> Budget Information



▲ Note

In order to update a freeform item to a catalog item, the **Order Supplier** field needs to be empty. If the field is already populated, then the populated information needs to be deleted and then the page needs to be saved. Once you click **Save**, then you will be able to search for a comparable good or service in the **Product** field.

Product Search - See All

To conduct a more advanced search for an alternative item in the **Product** field, users should select **See All** from the drop-down menu.

Quantity	Commodity	Product Code	Name	Image	Product Summary	Supplier	Manufacturer	Price	Validity Start Date	Validity End
1	Masking tape	CRP30004-3-49-6707	Masking Tape, Utility, 3", 16 rolls per case		Masking Tape, Utility, 3", 16 rolls per case (3-49-6707) General-purpose masking tape protects contoured or rounded surfaces from being marred by paint, varnish, or other finishing materials. Crepe paper	CINCINNATI ASSOCIATION FOR THE BLIND	3M	74.400	4/4/2023	4/30

A pop-up **Browse Items** page will appear, and will automatically filter based on the Supplier on the original item. Users can search using the same options and filters as the regular Browse Items page. (keywords, MBDD Status, etc.)

If a suitable item is identified, click the **Checkbox** () icon to select it. The selected item will automatically overwrite the freeform item information.

▲ Note

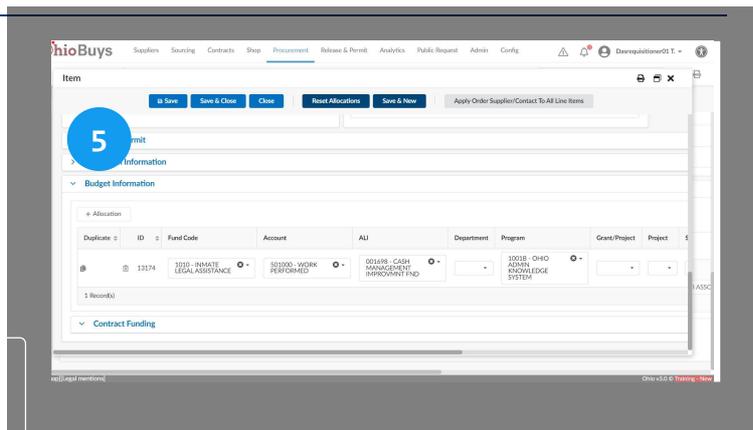
If an update was made using the Product field, users should go back and repopulate the **Order Supplier** and **Supplier Contact** fields.

Review Budget Information

5. Scroll down and expand the **Budget Information** header to view the line item's budget/chartfield information and make updates as necessary. Ensure existing budget/chartfield information is accurate, or complete unpopulated fields as necessary. (e.g., **Fund**, **Account**, **ALI**, **Department**, **Program**)

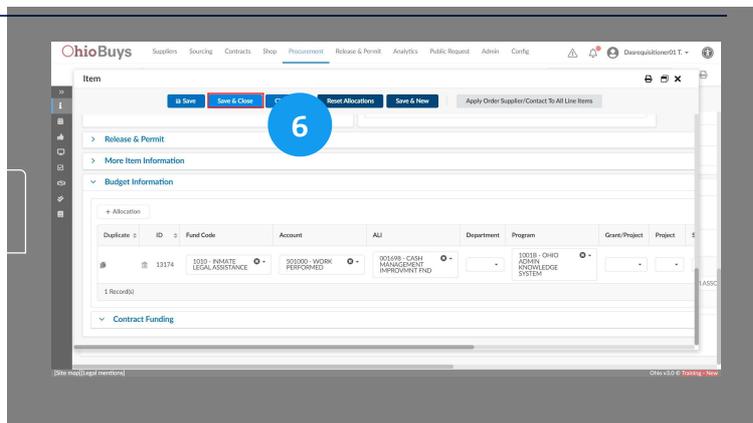
Press the **Enter** key to continue.

Duplicate	ID	Fund Code	Account	ALI	Department	Program	Grant/Project	Project
	13174	1000 - BIMATE LEGAL ASSISTANCE	001000 - WORK PERFORMED	001498 - CASH MANAGEMENT IMPROVEMENT FND		10018 - OHIO ADMIN KNOWLEDGE SYSTEM		

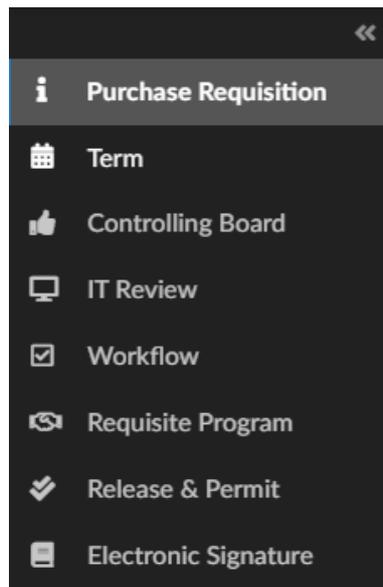


Save Line Item Information

6. Click **Save & Close**.



Additional Purchase Requisition Tabs

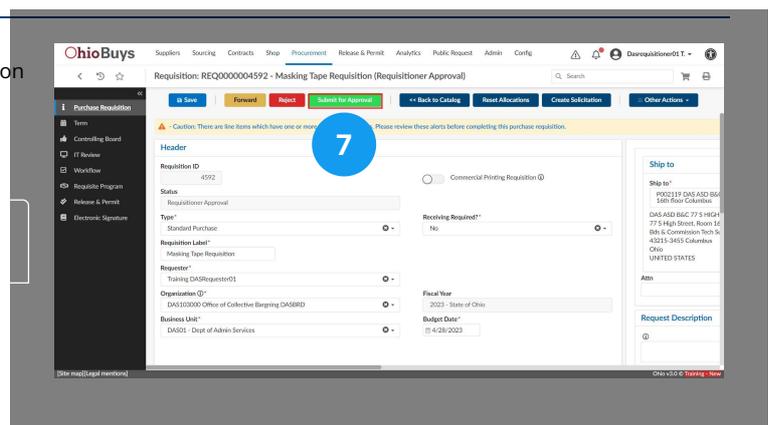


After updating the purchase requisition information, navigate to the tabs on the left to validate or change the purchase requisition information as necessary:

- **Term tab:** View associated terms (i.e., a milestone type or subscription type of term where purchase orders are released to the Supplier according to a set schedule) or create new terms by clicking Create Term
- **Controlling Board tab:** View the purchase requisition's Controlling Board or Direct Purchase Authority information. OhioBuys allows you to automatically check a purchase requisition's impact on your agency's Controlling Board Threshold and whether it is within your agency's direct purchase authority
- **Workflow tab:** View the current status and the approval history of the purchase requisition
- **Requisite Program tab:** View if the purchase requisition is undergoing review by a Requisite Procurement Program
- **Release & Permit tab:** View release and permit information associated with the purchase requisition
- **Electronic Signature tab:** Allows users to configure electronic document signatures associated with the purchase requisition (feature coming soon)

Submit for Approval

7. Once you have reviewed and updated the purchase requisition as necessary, click **Submit for Approval**.



Creating and Managing Purchase Requisitions in OhioBuys Reviewing and Updating a Purchase Requisition

▲ Note

- Once you click Submit for Approval, the purchase requisition is validated.
- If the purchase requisition does not require additional approvals, it creates a purchase order.
- If the purchase requisition requires additional approvals, it continues along the approval process.
- If you click **Reject**, input a reason in the subsequent pop-up box; the requisition is then sent back to the Requester.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771
OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Requester Supervisor - Approving a Purchase Requisition

Updated: 03/27/2025 03:34 PM

Version: 8.0

1 Purpose & Profiles

This job aid covers how to approve a purchase requisition as a Requester Supervisor.

Profiles: Requester Supervisor

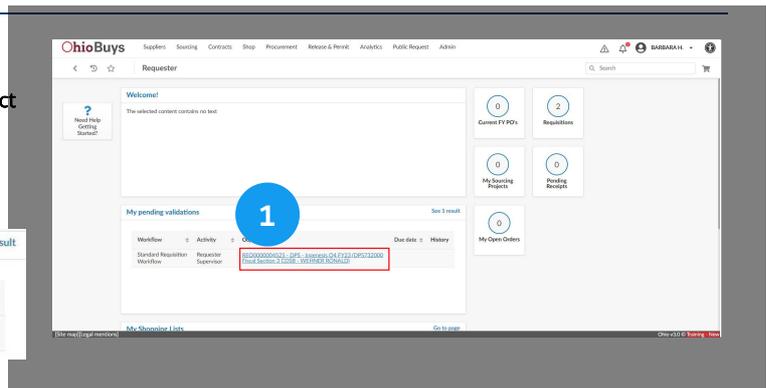
Used When

Reference this when approving a purchase requisition as a Requester Supervisor.

My Pending Validations

1. Requisitions requiring Supervisor approval will appear in the **My Pending Validations** section of your homepage. Click the **Object Hyperlink** to open it.

Workflow	Activity	Object	Due date	History
Standard Requisition Workflow	Requester Supervisor	REQ000004525 - DPS - Ingenesis Q4 FY23 (DPS732000 Fiscal Section 3 CDSB - WEHNER RONALD)		



DOT Note

Requester Supervisors in DOT can only update the **Request Description** and **Comments to Supplier** fields on the requisition Header, and the **Controlling Board** field on the line items. DOT approvers can also upload additional attachments. DOT approvers cannot update any other fields on a purchase requisition during the approval process. If additional edits are required, DOT approvers must reject the purchase requisition with instructions on how to update the purchase requisition.

Reviewing the Purchase Requisition Header Information

Review the information in the **Header** tab. This tab includes key information about the purchase requisition.

Header

Requisition ID 4525	<input type="radio"/> Commercial Printing Requisition ⓘ
Status Supervisor	Receiving Required? No
Type Standard Purchase	Fiscal Year 2023 - State of Ohio
Requisition Label DPS - Ingensis Q4 FY23	Budget Date 4/12/2023
Requester WEHNER RONALD	
Organization ⓘ DPS732000 Fiscal Section 3 CDSB	
Business Unit DPS01 - Dept of Public Safety	

Scroll to the right of the purchase requisition to review the information in the **Ship To** and **Bill To** tabs. These tabs include the shipping address and the billing address your goods and/or services will be sent to, respectively. Review the information in the **Request Description** tab. This tab includes information related to the requisition. Review the information in the **Comments to Supplier** tab. This tab includes comments for the supplier.

Ship to DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE Ohio UNITED STATES	Bill To DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE Ohio UNITED STATES
Attn DPS Requester	
Request Description ⓘ Payment for Ingensis Non-IT Staff Aug for Q4 of FY23	
Comments to Supplier Negotiated quote is attached	

Scroll down on the purchase requisition to review the **Purchasing Options** and **Attachments** section. You can expand on the section by clicking on the associated header.

The **Purchasing Options** section indicates if the purchase requisition requires a DAS Sourcing Event, if it is Single or Sole Source, if it should be put on hold, if it should be encumbered, or if it is related to sudden and accidental direct physical damage to property. Use the displayed radio buttons to make your selections. If a DAS Sourcing Event is required, click the Request DAS to Source button to complete the associated request form, which will then be routed to DAS.

▼ Purchasing Options

<input type="radio"/> Single Source	<input type="radio"/> Do Not Encumber	<input type="radio"/> Put PR On Hold?
<input type="radio"/> Sole Source	<input type="radio"/> Sudden and accidental direct physical damage to property? ⓘ	

Request DAS to Source

Review any attached internal, Supplier, or justification attachments as necessary in the **Attachments** section.

▼ Attachments - Internal, Supplier, and Justification ⓘ

→ 0 Selected

Title	Att.	Contact
Quote - ING20230412		WEHNER RONALD

1 Record(s)

Scroll down on the purchase requisition to the **Items** box to view the line item(s) associated with the purchase requisition.

Creating and Managing Purchase Requisitions in OhioBuys Requester Supervisor - Approving a Purchase Requisition

Items & Services

#	Ref.	Item description	Ordered Quantity	Unit	Price	Total	Deliv. date	Blanket PO ID	Blanket PO Line Number	OAKS ID	Supplier
4525-1	8000	HOURLY STAFFING FEE FOR NON-IT STAF...	1.00	AMT	1,500.000	1,500.00	5/12/2023			0000229814	(INGENESIS INC) INGENESIS INC

1 Record(s)

To review information related to the item, click the **Pencil** () icon next to the associated freeform line item. In this tab, users can see information about the item, supplier, and pricing. Once you have validated the item, click **Save & Close** to finalize the selection. In the Items box, the line item information updates to the line item information you have chosen.

Item

Save Save & Close Close Save & New

Describe the item

ID: 6435

Name: HOURLY STAFFING FEE FOR NON-IT STAFF AUGM... Item Code: 30194

Ordered Qty: 1.00 Unit: AMT

Commodity: 80111600 - Temporary personnel services Profile ID:

MBE Set Aside: N

Type: Product

Delivery Date: 5/12/2023

Product Code: CSP900917-2

Continuation?
 Yes
 No

Select Supplier

Supplier: INGENESIS INC

Order Supplier: INGENESIS INC

Supplier Contact: Ingenesis Greg

Supplier Location: CHK

Use Non-Default Supplier Location

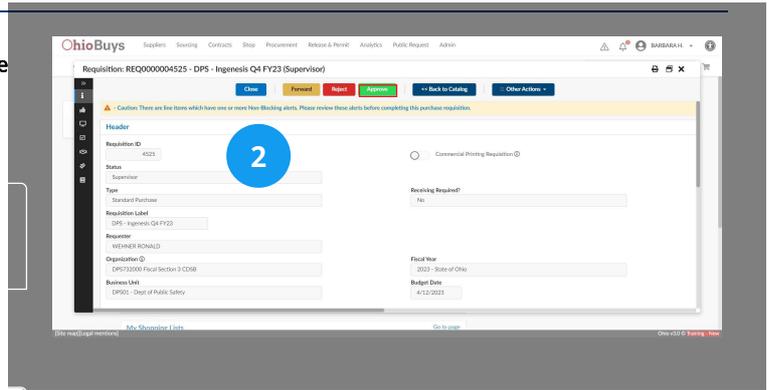
Dealers Available

Controlling Board Number:

Save & Close

Approve

2. Review the purchase requisition. If it is justified, click **Approve** to send it to a Requisitioner for completion.



▲ Note

If the purchase requisition is not justified, click **Reject**. This sends the request back to the initial Requester for revisions. After rejecting a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. This will be sent along with the purchase requisition back to the Requester.



Reason :

Cancel Confirm

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771
OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys

Additional Agency Approver - Approving a Purchase Requisition

Updated: 03/27/2025 03:33 PM

Version: 4.0

1 Purpose & Profiles

This job aid covers the process of reviewing, updating, and approving or rejecting a purchase requisition as an Additional Agency Approver.

Profiles: Additional Agency Approvers

2 Used When

Reference this when a user receives a notification that a purchase requisition requires their review.

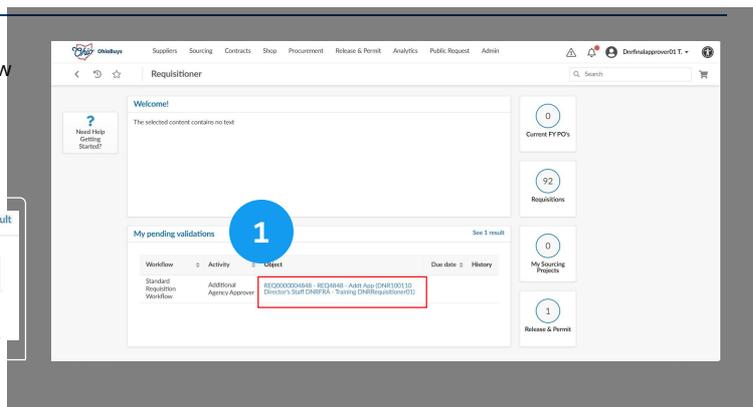
Open Pending Validations

1. Log in to OhioBuys. From the My Pending Validations window on the homepage, click on the **Object** hyperlink.

My pending validations

See 1 result

Workflow	Activity	Object	Due date	History
Standard Requisition Workflow	Additional Agency Approver	REQ000004848 - REC4848 - Adit App [DNR100110 Director's Staff DNRFR - Training DNRRequisitioner01]		



Reviewing the Purchase Requisition Header Information

Review the information in the **Header** tab. This tab includes key information about the purchase requisition.

Header

Requisition ID 4525	<input type="radio"/> Commercial Printing Requisition ⓘ
Status Supervisor	Receiving Required? No
Type Standard Purchase	Fiscal Year 2023 - State of Ohio
Requisition Label DPS - Ingensis Q4 FY23	Budget Date 4/12/2023
Requester WEHNER RONALD	
Organization ⓘ DPS732000 Fiscal Section 3 CDSB	
Business Unit DPS01 - Dept of Public Safety	

Scroll to the right of the purchase requisition to review the information in the **Ship To** and **Bill To** tabs. These tabs include the shipping address and the billing address your goods and/or services will be sent to, respectively. Review the information in the **Request Description** tab. This tab includes information related to the requisition. Review the information in the **Comments to Supplier** tab. This tab includes comments for the supplier.

Ship to DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE Ohio UNITED STATES	Bill To DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE Ohio UNITED STATES
Attn DPS Requester	
Request Description ⓘ Payment for Ingensis Non-IT Staff Aug for Q4 of FY23	
Comments to Supplier Negotiated quote is attached	

Scroll down on the purchase requisition to review the **Purchasing Options** and **Attachments** section. You can expand on the section by clicking on the associated header.

The **Purchasing Options** section indicates if the purchase requisition requires a DAS Sourcing Event, if it is Single or Sole Source, if it should be put on hold, if it should be encumbered, or if it is related to sudden and accidental direct physical damage to property. Use the displayed radio buttons to make your selections. If a DAS Sourcing Event is required, click the Request DAS to Source button to complete the associated request form, which will then be routed to DAS.

▼ **Purchasing Options**

<input type="radio"/> Single Source	<input type="radio"/> Do Not Encumber	<input type="radio"/> Put PR On Hold?
<input type="radio"/> Sole Source	<input type="radio"/> Sudden and accidental direct physical damage to property? ⓘ	

[Request DAS to Source](#)

Review any attached internal, Supplier, or justification attachments as necessary in the **Attachments** section.

Creating and Managing Purchase Requisitions in OhioBuys Additional Agency Approver - Approving a Purchase Requisition

Attachments - Internal, Supplier, and Justification

0 Selected

Title	Att.	Contact
Quote - ING20230412		WEHNER RONALD

1 Record(s)

Scroll down on the purchase requisition to the **Items** box to view the line item(s) associated with the purchase requisition.

Items & Services

Add a line Edit Lines

#	Ref.	Item description	Ordered Quantity	Unit	Price	Total	Deliv. date	Blanket PO ID	Blanket PO Line Number	OAKS ID	Supplier
4525-1	8000	HOURLY STAFFING FEE FOR NON-IT STAF...	1.00	AMT	1,500.000	1,500.00	5/12/2023			0000229814	(INGENESIS INC INGENESIS INC

1 Record(s)

To review information related to the item, click the **Pencil** () icon next to the associated freeform line item. In this tab, users can see information about the item, supplier, and pricing. Once you have validated the item, click **Save & Close** to finalize the selection. In the Items box, the line item information updates to the line item information you have chosen.

Item

Save Save & Close Close Save & New

Describe the item

ID: 6435

Name: HOURLY STAFFING FEE FOR NON-IT STAFF AUGM... Item Code: 30194

Ordered Qty: 1.00 AMT

Commodity: 80111600 - Temporary personnel services Profile ID:

MBE Set Aside: N

Type: Product

Delivery Date: 5/12/2023

Product Code: CSP900917-2

Continuation?
 Yes
 No

Select Supplier

Supplier: INGENESIS INC

Order Supplier: INGENESIS INC

Supplier Contact: Ingenesis Greg

Supplier Location: CHK

Use Non-Default Supplier Location

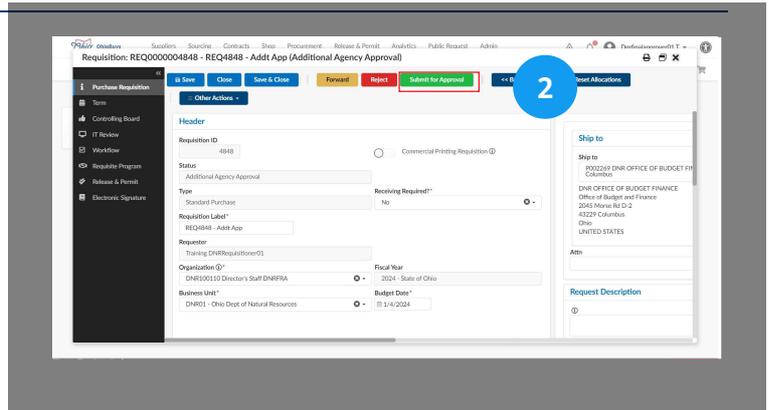
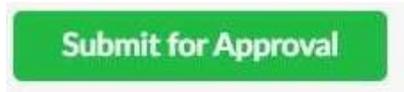
Dealers Available

Controlling Board Number:

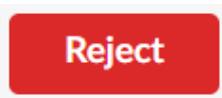
Save & Close

Click Submit for Approval

2. If the requisition is justified and the details are satisfactory, click the **Submit for Approval** button to approve it.

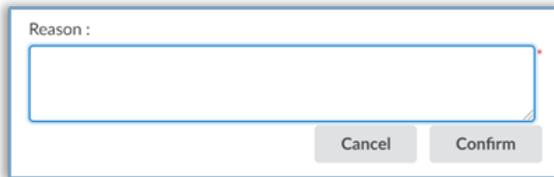


If the purchase requisition is not justified, or any aspect of the purchase requisition requires further revisions, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed.



▲ Note

If you reject a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. These comments will be emailed to the Requester.

A pop-up comment box with a text input field and "Cancel" and "Confirm" buttons.

▲ Note

If you are approving a Pcard purchase it will automatically be processed into a purchase order once you and all other assigned Additional Agency Approvers have approved.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



Agency Procurement Approver - Approving a Purchase Requisition

Updated: 03/27/2025 03:28 PM

Version: 7.0

1 Purpose & Profiles

This job aid covers how to approve a purchase requisition as an Agency Procurement Approver.

Profiles: Agency Procurement Approver

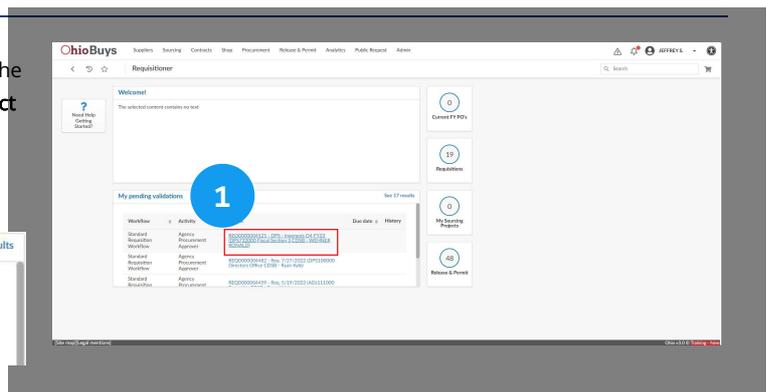
2 Used When

Reference this when approving a purchase requisition as an Agency Procurement Approver.

My Pending Validations

1. Requisitions requiring Procurement approval will appear in the **My Pending Validations** section of your homepage. Click the **Object Hyperlink** to open it.

Workflow	Activity	Object	Due date	History
Standard Requisition Workflow	Agency Procurement Approver	REQ0000004525 - DPS - Ingressis 04 FY23 (DPS232000 Fiscal Section 3 CDSB - WEHNER RONALD)		



DOT Note

DOT Agency Procurement Approvers can only update the **Request Description** and **Comments to Supplier** fields on the requisition Header, and the **Controlling Board** field on the line items. DOT approvers can also upload additional attachments. DOT approvers cannot update any other fields on a purchase requisition during the approval process. If additional edits are required, DOT approvers must reject the purchase requisition back to the Requisitioner with instructions on how to update the purchase requisition.

Reviewing the Purchase Requisition Header Information

Review the information in the **Header** tab. This tab includes key information about the purchase requisition. If a user updates the **Organization** field, they must click **Save** and then click **Cancel** on the subsequent pop-up window that is displayed. If the purchase requisition should be a Pcard purchase, you must reject it back to the Requisitioner with instructions to apply their Pcard. If the initial Requester's Pcard should be applied, instruct the Requisitioner to also reject the purchase with those instructions contained in their comment to the Requester.

Header

Requisition ID
4525 Commercial Printing Requisition ⓘ

Status
Procurement Approval

Type
Standard Purchase Receiving Required?*
No

Requisition Label*
DPS - Ingensis Q4 FY23

Requester
WEHNER RONALD

Organization ⓘ*
DPS732000 Fiscal Section 3 CDSB Fiscal Year
2023 - State of Ohio

Business Unit*
DPS01 - Dept of Public Safety Budget Date*
4/12/2023

Scroll to the right of the purchase requisition to review the information in the **Ship To** and **Bill To** tabs. These tabs include the shipping address and the billing address your goods and/or services will be sent to, respectively. Review the information in the **Request Description** tab. This tab includes information related to the requisition. Review the information in the **Comments to Supplier** tab. This tab includes comments for the supplier.

Ship to

Ship to*
P005432 DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X BRECKSVILLE
DPS INVESTIGATIVE UNIT
6650 W SNOWVILLE RD SUITE X
4141 BRECKSVILLE
Ohio
UNITED STATES

Attn
DPS Requester

Request Description

ⓘ
Payment for Ingensis Non-IT Staff Aug for Q4 of FY23

Comments to Supplier

Negotiated quote is attached

Scroll down on the purchase requisition to review the **Purchasing Options** section. You can expand on the section by clicking on the associated header. As the Agency Procurement Approver you are responsible for selecting any **Purchasing Options** that should be applied to the purchase requisition:

- Single Source:** indicates that the purchase is from one selected supplier, even though there are other suppliers that provide similar products
- Sole Source:** Indicates that the selected supplier is the only one that can adequately fulfill the need outlined in the purchase requisition
- Put PR on Hold? :** If DAS Procurement review chooses not to release the procurement, they have the ability to put it on hold and do the procurement on behalf of the agency
- Do Not Encumber:** Selecting this button will not encumber funds in OAKS for the purchase requisition; please note that if the Pcard slider is selected for a purchase requisition, this option will not be displayed and OAKS will automatically not encumber the purchase
- Sudden and accidental direct physical damage to property?:** Indicates if the purchase is related to property damage, in which case the requisition will appear in a report sent to DAS Office of Risk Management

▼ **Purchasing Options**

Single Source Do Not Encumber Put PR On Hold?

Sole Source Sudden and accidental direct physical damage to property? ⓘ

Request DAS to Source

Creating and Managing Purchase Requisitions in OhioBuys Agency Procurement Approver - Approving a Purchase Requisition

Scroll down on the purchase requisition to the **Items** box to view the line item(s) associated with the purchase requisition.

Items & Services

Add a line Delete Lines Copy Selected Lines Edit Lines

1 Selected Set Allocations Quick Quote

✓	#	Ref.	Item description	Ordered Quantity	Unit	Supplier
✓	4525-1	8000	HOURLY STAFFING FEE FOR NON-IT STAF...	1.00	AMT	(INGENESIS INC.) INGENESIS INC

As an Agency Procurement Approver you may need to update the **Order Supplier** if one has not already been selected. This can be accessed by clicking the **Pencil** () icon next to the line item. Review the information about the item, supplier, and pricing and select an **Order Supplier** from the drop-down menu if necessary. Once you have validated the item, click **Save & Close** to finalize the selection. In the Items box, the line item information updates to the line item information you have chosen.

Item

Save Save & Close Close Reset Allocations Save & New Apply Order Supplier/Contact To All Line Items

Describe the item

ID: 6435

Name*: HOURLY STAFFING FEE FOR NON-IT STAFF AUGME... Item Code: 30194

Ordered Qty: 1.00 AMT

Commodity: 80111600 - Temporary personnel services Profile ID:

MBE Set Aside: N

Type: Product

Delivery Date: 5/12/2023

Product Code: CSP900917-2

Continuation?
 Yes
 No

Select Supplier

Supplier: INGENESIS INC

Order Supplier: INGENESIS INC

Supplier Contact: Ingenesis Greg

Supplier Location: CHK

Use Non-Default Supplier Location

Dealers Available

Controlling Board Number:

Order Supplier

INGENESIS INC

INGENESIS INC
0000229814-3
100 NE LOOP 410 STE 806 78216 SAN ANTONIO

INGENESIS INC
0000229814-2
10231 KOTZEBUE ST 78217 SAN ANTONIO

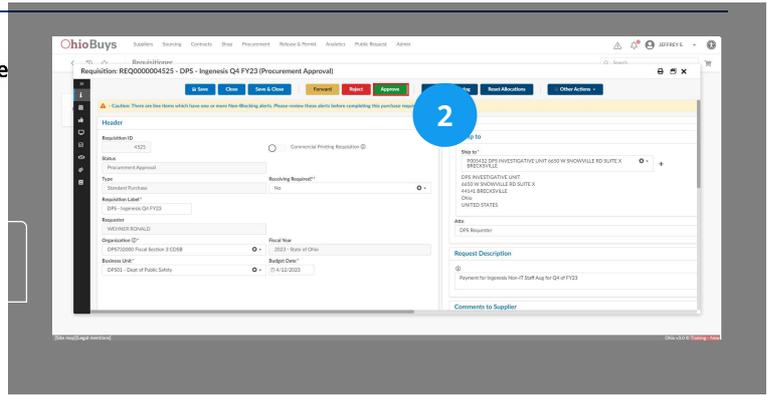
See All

Save & Close

Approve

2. Review the purchase requisition. If it is justified, click **Approve** button to send the purchase requisition to the next step in the approval workflow.

Approve



▲ Note

If the requester's purchase requisition is not justified, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed. After rejecting a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. This will be sent along with the purchase requisition back to the requester.

Reject

Reason :

Cancel Confirm

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys

Agency Fiscal Approver - Approving a Purchase Requisition

Updated: 03/27/2025 03:31 PM

Version: 8.0

1 Purpose & Profiles

This job aid covers how to approve a purchase requisition as an Agency Fiscal Approver

Profiles: Agency Fiscal Approver

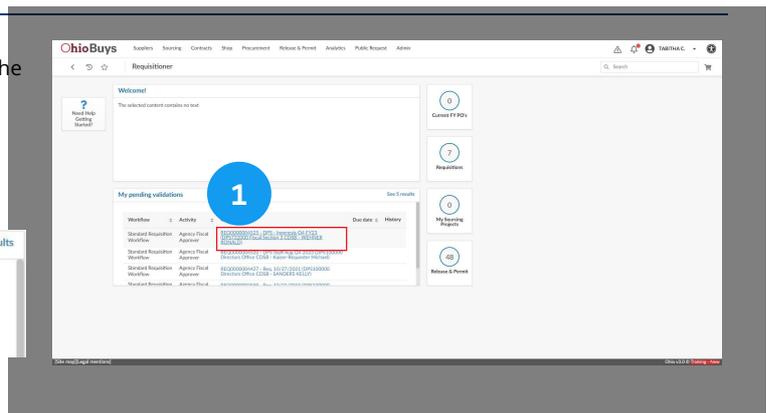
Used When

Reference this when approving a purchase requisition as an Agency Fiscal Approver

My Pending Validations

1. Requisitions requiring Agency Fiscal approval will appear in the **My Pending Validations** section of your homepage. Click the **Object Hyperlink** to open it.

Workflow	Activity	Object	Due date	History
Standard Requisition Workflow	Agency Fiscal Approver	REQ0000004525 - DPS - Ingenesis Q4 FY23 DPS 3/2020 Fiscal Section 3 CDSB - WEHNER RONALD		



DOT Note

DOT Fiscal Approvers can only update the **Request Description** and **Comments to Supplier** fields on the requisition Header, and the **Controlling Board** field on the line items. DOT approvers can also upload additional attachments. DOT approvers cannot update any other fields on a purchase requisition during the approval process. If additional edits are required, DOT approvers must reject the purchase requisition back to the Requisitioner with instructions on how to update the purchase requisition.

DOT Purchase Requisitions are only allowed one chartfield line per item. Reject the purchase requisition if users have applied multiple lines to any items.

For additional detail on DOT chartfields, please refer to [Entering Chartfield Information on a DOT Purchase Requisition](#).

Reviewing the Purchase Requisition Header Information

Review the information in the **Header** tab. This tab includes key information about the purchase requisition and contains the **Budget Date**, which can be edited by an Agency Fiscal Approver. If the purchase requisition should be a Pcard purchase, you must reject it back to the Requisitioner with instructions to apply their Pcard. If the initial Requester's Pcard should be applied, instruct the Requisitioner to also reject the purchase with those instructions contained in their comment to the Requester.

Header

Requisition ID: 4525 Commercial Printing Requisition ⓘ

Status: Fiscal Approval

Type: Standard Purchase Receiving Required?: No

Requisition Label: DPS - Ingenesis Q4 FY23

Requester: WEHNER RONALD

Organization ⓘ: DPS732000 Fiscal Section 3 CDSB Fiscal Year: 2023 - State of Ohio

Business Unit: DPS01 - Dept of Public Safety Budget Date*: 4/12/2023

Scroll to the right of the purchase requisition to review the information in the **Ship To** and **Bill To** tabs. These tabs include the shipping address and the billing address your goods and/or services will be sent to, respectively. Review the information in the **Request Description** tab. This tab includes information related to the requisition. Review the information in the **Comments to Supplier** tab. This tab includes comments for the supplier.

Ship to

Ship to: P006432 DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X BRECKSVILLE
DPS INVESTIGATIVE UNIT
6650 W SNOWVILLE RD SUITE X
44141 BRECKSVILLE
Ohio
UNITED STATES

Attn: DPS Requester

Request Description

Payment for Ingenesis Non-IT Staff Aug for Q4 of FY23

Comments to Supplier

Negotiated quote is attached

Scroll down on the purchase requisition to review the **Purchasing Options** section. You can expand on the section by clicking on the associated header. Use the radio buttons to determine whether or not to encumber the order.

Purchasing Options

Single Source Do Not Encumber Put PR On Hold?

Sole Source Sudden and accidental direct physical damage to property? ⓘ

[Request DAS to Source](#)

Click the **Chart of Account Values** header to review all of the chartfield information used in the purchase requisition. Agency Fiscal Approvers cannot edit the information at this time.

Chart of Account Values

#	Expense account	Site ⓘ	Percentage	Incl. Tax Amount (0)	Department
4525-1	501000 - WORK PERFORMED	DPS732000 Fiscal Section 3 CDSB	100.00	1,500.00	DPS210400 - SEC ASSMT

Reviewing Line Item and Chartfield Information

Scroll down on the purchase requisition to the **Items** box to view the line item(s) associated with the purchase requisition.

Items & Services

Add a line Edit Lines

0 Selected Set Allocations Quick Quote

#	Ref.	Item description	Ordered Quantity	Unit	Price	Supplier	Total	Deliv. date
4525-1	8000	HOURLY STAFFING FEE FOR NON-IT STAF...	1.00	AMT	1,500.000	(INGENESIS INC) INGENESIS INC	1,500.00	5/12/2023

1 Record(s)

As an Agency Fiscal Approver you will need to review the **Supplier Location, Controlling Board Number, Application of a Speed Chart, or Budget Information**. Click the **Pencil** () icon next to the line item(s) to review and/or update the information.

Review the **Supplier Location** field. This field auto-populates with the Supplier's default Supplier Location. If you wish to use another option, you must click the **Use Non-Default Supplier Location** slider. In addition, the **Controlling Board Number** can be edited now.

Select Supplier

Supplier
INGENESIS INC 

Order Supplier ⓘ
INGENESIS INC 

Supplier Contact
Ingenesis Greg 

Supplier Location ⓘ
CHK

Use Non-Default Supplier Location

Dealers Available

Controlling Board Number ⓘ

Scroll down on the line item page to the **Pricing** header to review the pricing. If you wish to add budget information using **Speed Charts**, select **Yes** under the option to apply a Speed Chart. For more information on applying speed charts, please refer to the [Applying Speed Charts Job Aid](#).

Pricing

1,500.0000 USD ⓘ

Total Amount
1,500.000

Supplier Quote ID ⓘ
ING123

Do you want to apply a Speed Chart?

Yes
 No

Speed Chart can be applied ⓘ

Scroll to the bottom of the line item page and click the **Budget Information** header.

Creating and Managing Purchase Requisitions in OhioBuys

Agency Fiscal Approver - Approving a Purchase Requisition

▼ Budget Information

To be allocated

+ Allocation 0.000 USD

Duplicate	ID	Fund Code	Account	ALI	Department
	12982	GRF - GENERAL REVENUE	501000 - WORK PERFORMED	005406 - LAW-RELATED EDUCATION	DPS210400 - SEC ASSMT

Add or update the chartfield information as appropriate. Use the **+Allocation** to create additional chartfield strings for this line item. You can update fields in multiple chartfield strings on a line item by clicking the **Checkbox** () icon to their left and then selecting **Edit Lines**. The chartfield information you enter is the same as what was previously entered in OAKS. Chartfield lines can be duplicated by clicking the **Copy** () icon or deleted by clicking the **Trashcan** () icon.

- How a user allocates their chartfields will depend on the **UOM** selected for the line item. Users should only enter allocations for items with a **UOM** of **AMT** in the **Incl. Tax Amount (USD)** field. Items with any **UOM** that is **NOT AMT** should be allocated using the **Percentage** field.
- You must update the chartfield information for each line item individually.
- When purchasing from an internal Supplier you must fill in the ISTV Xref field. You must update the Account to an ISTV account code whenever an ISTV Xref is present.
- Account field: Users should click the See All option at the bottom of the dropdown to view only those account codes that are associated with the item's commodity code. (Users will see account codes that may not be linked with the commodity code if they just use the dropdown to select an account code.)
- Beginning with FY24 transactions, populating the Service Location field is mandatory on all purchases. If the budget date on a purchase requisition is on, or after 7/1/2023, Fiscal Approvers will be required to complete the Service Location field before they will be able to submit the purchase requisition.

Once you have validated the item, click **Save & Close** to finalize the selection. In the Items box, the line item information updates to the line item information you have chosen.

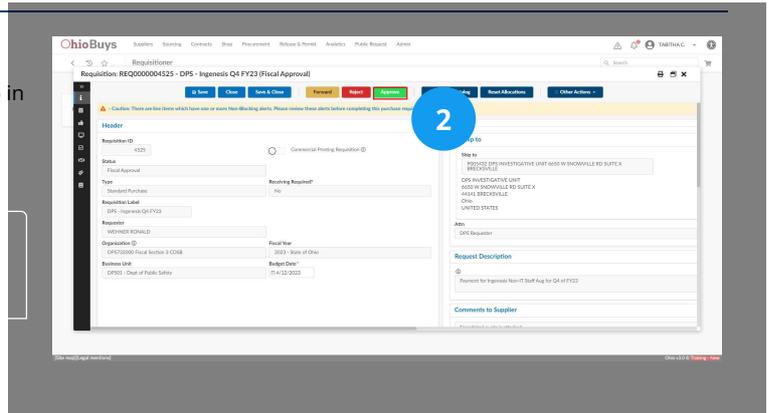
Save & Close

For additional details on adding or updating chartfield information, refer to the following document:

[Completing Chartfield Information](#)

Approve

2. Review the purchase requisition. If it is justified, click **Approve** button to send the purchase requisition to the next step in the approval workflow.



▲ Note

If the Requester's purchase requisition is not justified, select the **Reject** button. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed. After rejecting a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. This will be sent along with the purchase requisition back to the Requester.



If COA validation fails, a red **Resubmit COA Validation** button will appear at the top of the purchase requisition and the associated Fiscal Agency Approver will receive both an email notification and a pending validation. This means that there was an error validating the chartfield information for this PR. Correct the chartfield information if necessary, then click **Resubmit COA Validation**. The PR will advance to the next step of the workflow. Please note if a purchase requisition fails COA validation, any fiscal approver in your agency for whom the purchase requisition is in scope can edit and resubmit COA validation.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Agency Final Approver - Approving a Purchase Requisition

Updated: 03/27/2025 03:27 PM

Version: 8.0

1 Purpose & Profiles

This job aid covers how to approve a purchase requisition as an Agency Final Approver

Profiles: Agency Final Approver

Used When

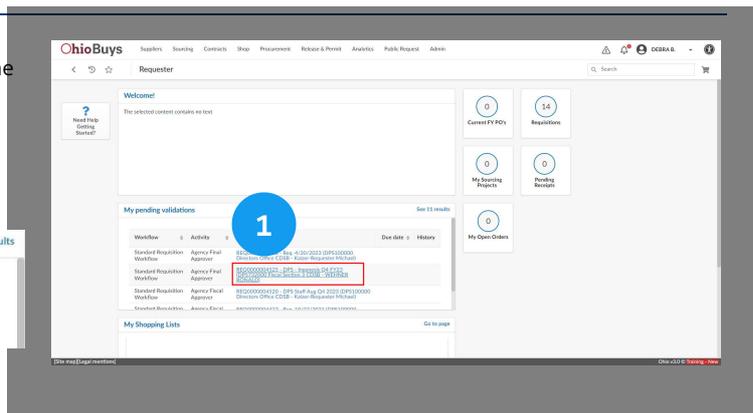
Reference this when approving a purchase requisition as an Agency Final Approver

My Pending Validations

1. Requisitions requiring Agency Final approval will appear in the **My Pending Validations** section of your homepage. Click the **Object Hyperlink** to open it.

My pending validations See 11 results

Workflow	Activity	Object	Due date	History
Standard Requisition Workflow	Agency Final Approver	REQ0000004563 - Req. 4/20/2023 (DPS100000 Directors Office CDSB - Kaizer-Requester Michael)		



DOT Note

DOT Agency Final Approvers can only update the **Request Description** and **Comments to Supplier** fields on the requisition Header, and the **Controlling Board** field on the line items. DOT approvers can also upload additional attachments. DOT approvers cannot update any other fields on a purchase requisition during the approval process. If additional edits are required, DOT approvers must reject the purchase requisition back to the Requisitioner with instructions on how to update the purchase requisition.

Reviewing the Purchase Requisition Header Information

As the Agency Final Approver, you cannot make any edits to a purchase requisition. Review the information in the **Header** tab. This tab includes key information about the purchase requisition.

Header

Requisition ID 4525	<input type="radio"/> Commercial Printing Requisition ⓘ
Status Final Approval	Receiving Required? No
Type Standard Purchase	Fiscal Year 2023 - State of Ohio
Requisition Label DPS - Ingensis Q4 FY23	Budget Date 4/12/2023
Requester WEHNER RONALD	
Organization ⓘ DPS732000 Fiscal Section 3 CD5B	
Business Unit DPS01 - Dept of Public Safety	

Scroll to the right of the purchase requisition to review the information in the **Ship To** and **Bill To** tabs. These tabs include the shipping address and the billing address your goods and/or services will be sent to, respectively. Review the information in the **Request Description** tab. This tab includes information related to the requisition. Review the information in the **Comments to Supplier** tab. This tab includes comments for the supplier.

<p>Ship to</p> <p>DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE Ohio UNITED STATES</p> <p>Attn DPS Requester</p>	<p>Bill To</p> <p>DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE Ohio UNITED STATES</p>
<p>Request Description</p> <p>Payment for Ingensis Non-IT Staff Aug for Q4 of FY23</p>	
<p>Comments to Supplier</p> <p>Negotiated quote is attached</p>	

Scroll down on the purchase requisition to the **Items** box to view the line item(s) associated with the purchase requisition. Click the **Pencil** () icon next to the line item(s) to review the information and click **Close** when you are done.

- > [Additional Agency Approvers](#)
- > [Organization Structure](#)
- > [Purchasing Options](#)
- > [Attachments - Internal, Supplier, and Justification ⓘ](#)
- > [Chart of Account Values](#)

Items & Services

Edit Lines

#	Ref.	Item description	Ordered Quantity	Unit	Price	Total	Deliv. date	Blanket PO ID
 	4525-1	8000	HOURLY STAFFING FEE FOR NON-IT STAF...	1.00	AMT	1,500.000	1,500.00	5/12/2023

Creating and Managing Purchase Requisitions in OhioBuys Agency Final Approver - Approving a Purchase Requisition

Item

Close Save & New Apply Order Supplier/Conti

Describe the item

ID: 6435

Name: HOURLY STAFFING FEE FOR NON-IT STAFF AUGM... Item Code: 30194

Ordered Qty: 1.00 AMT

Commodity: 80111600 - Temporary personnel services Profile ID:

MBE Set Aside: N

Type: Product

Delivery Date: 5/12/2023

Product Code: CSP900917-2

Continuation? Yes No

Select Supplier

Supplier: INGENESIS INC

Order Supplier: INGENESIS INC

Supplier Contact: Ingenesis Greg

Supplier Location: CHK

Use Non-Default Supplier Location

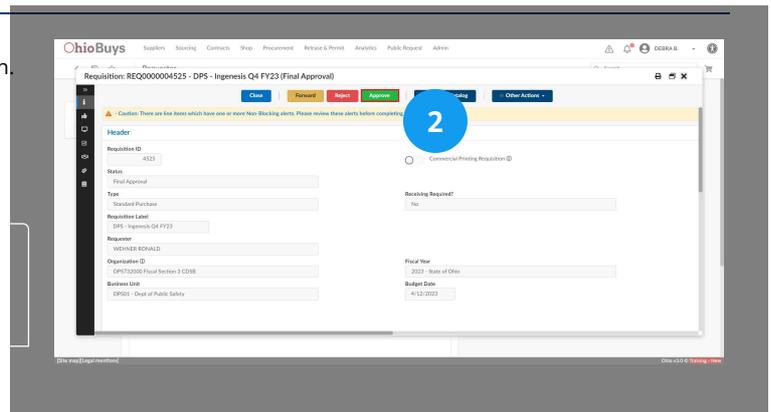
Dealers Available

Controlling Board Number:

Approve

2. Review the information contained in the purchase requisition. If the requisition is justified and the details are satisfactory, click **Approve**.

Approve



If the purchase requisition is not justified, or any aspect of the purchase requisition requires further revisions, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed. If you reject a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. These comments will be emailed to the Requester.

Reject

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Reviewing Sourcing Details for a Purchase Requisition

Updated: 03/27/2025 03:55 PM

Version: 4.0

1 Purpose & Profiles

This job aid covers the process of reviewing the sourcing details associated with a purchase requisition in OhioBuys.

Profiles: All OhioBuys users

Used When

Reference this when there is a need to review the sourcing information associated with the pricing of an item on a purchase requisition.

▲ Note

You can access pricing information that was the result of a quick quote or other type of solicitation directly from the requisition. Please note that the process for accessing, approving or rejecting the purchase requisition remains unchanged.

If the quick quote has been performed incorrectly (e.g., less than three responses, the lowest price was not selected without adequate justification, etc.) please reject the purchase requisition and instruct the Requisitioner to redo the quick quote.

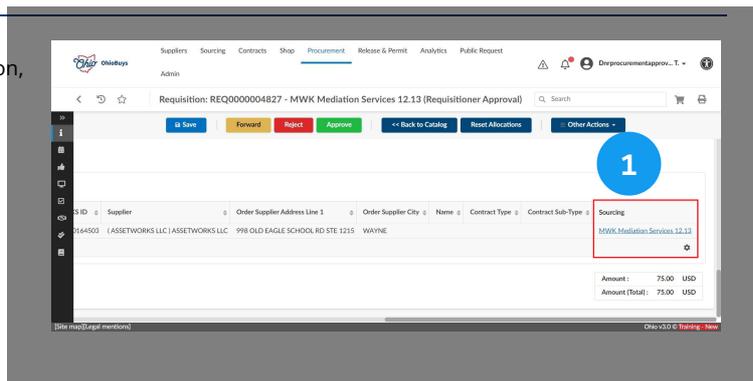
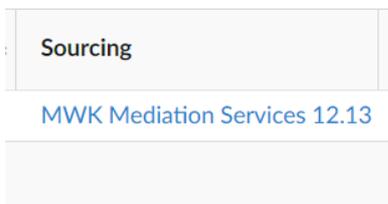
In order to review a quick quote, you will need to be included on the sourcing project team. If you are unable to access the quick quote please reach out to the user responsible for the solicitation and ask them to add you to the project team as an SME or Contributor.

For more information on sourcing project roles, please consult the following document:

[Manage Solicitation Team Members and Roles](#)

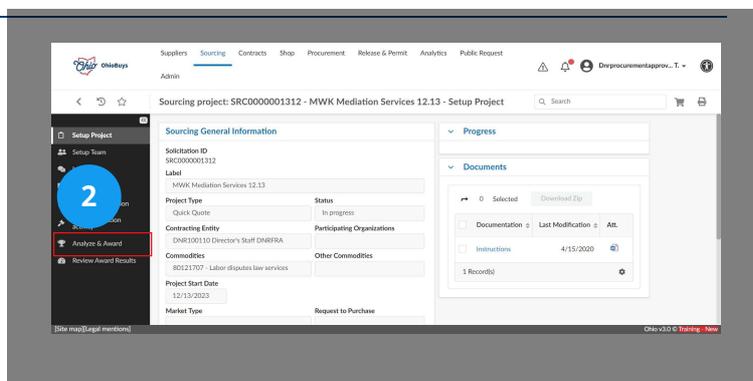
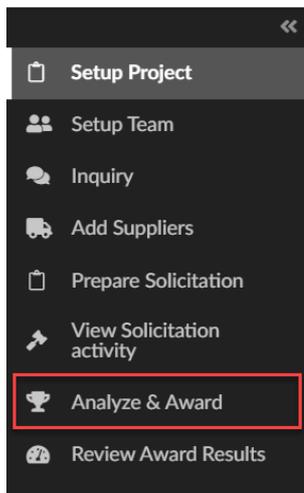
Sourcing Link on Line Item

1. To access a quick quote associated with a purchase requisition, scroll to the bottom of the purchase requisition to review the line item details. Click on the **Sourcing** hyperlink at the bottom right-hand corner of the page.



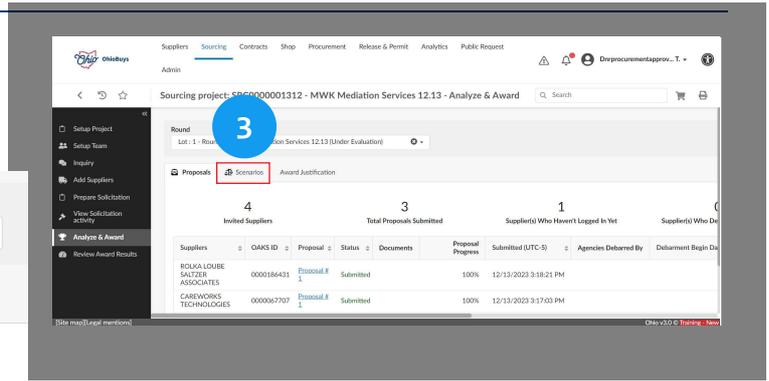
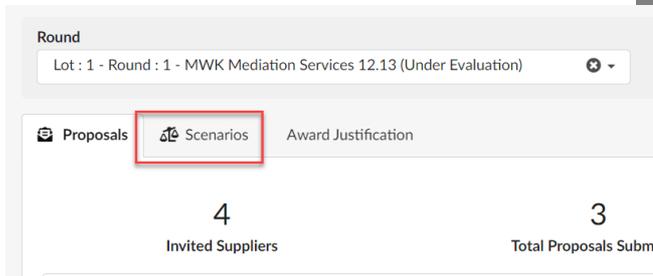
Analyze and Award

2. Navigate to the **Analyze and Award** tab of the solicitation.



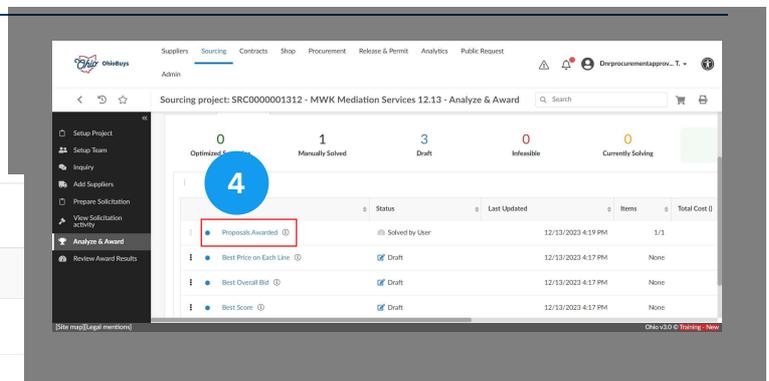
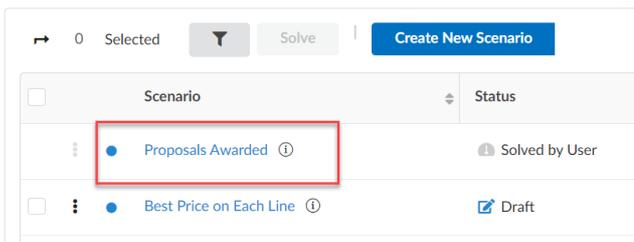
Scenarios

3. Navigate to the **Scenarios** header.



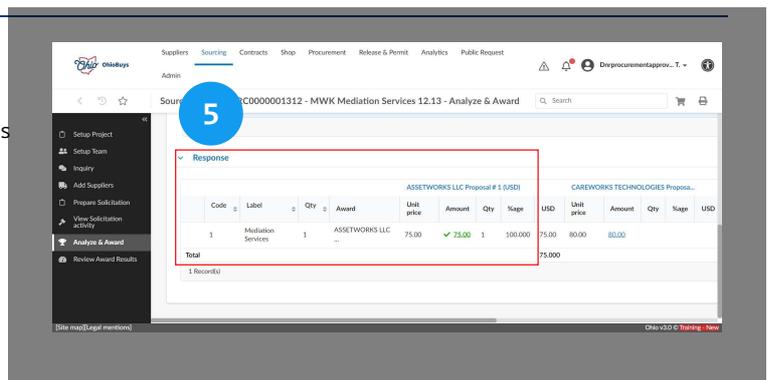
Proposals Awarded

4. Click on the **Proposals Awarded** hyperlink.



Review Responses

5. Scroll down to review Supplier responses. Note that the response highlighted in green is the lowest cost response. A **green check (✓)** next to a response indicates that proposal was selected.



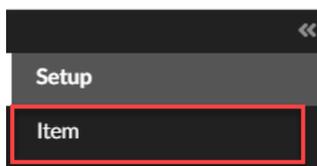
Creating and Managing Purchase Requisitions in OhioBuys

Reviewing Sourcing Details for a Purchase Requisition

Alternatively, if you would like to review the contents of a proposal individually, you can open it on the Proposals section of the Analyze and Award tab by clicking on the Proposal hyperlink.

Suppliers	OAKS ID	Proposal	Status	Documents	Proposal Progress	Submitted (UTC-5)	Agencies Debarred By
<input type="checkbox"/> ROLKA LOUBE SALTZER ASSOCIATES	0000186431	Proposal # 1	Submitted		100%	12/13/2023 3:18:21 PM	
<input type="checkbox"/> CAREWORKS TECHNOLOGIES	0000067707	Proposal # 1	Submitted		100%	12/13/2023 3:17:03 PM	
<input type="checkbox"/> ASSETWORKS LLC	0000164503	Proposal # 1	Submitted		100%	12/13/2023 3:16:27 PM	

Once the response opens, navigate to the Item tab.

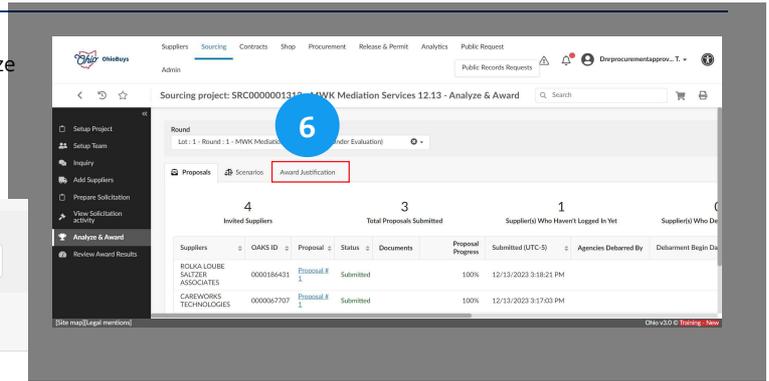
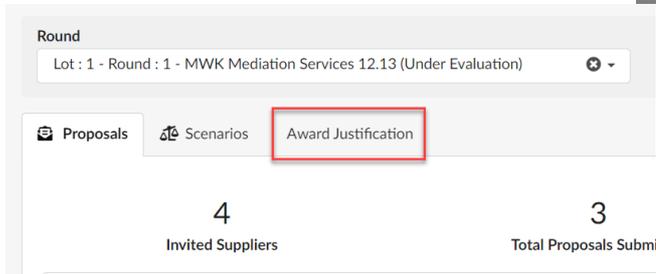


On this tab, users can review that supplier's detailed proposal, or download the proposal in Excel format.

Code	Type	Label	Qty	Unit	Unit price	Amount	Deliv. date	Deliv. date	Supplier Attachments
1	Required Item	Mediation Services	1	AMT	78.75	78.75	1/1/2024	12/29/2023	

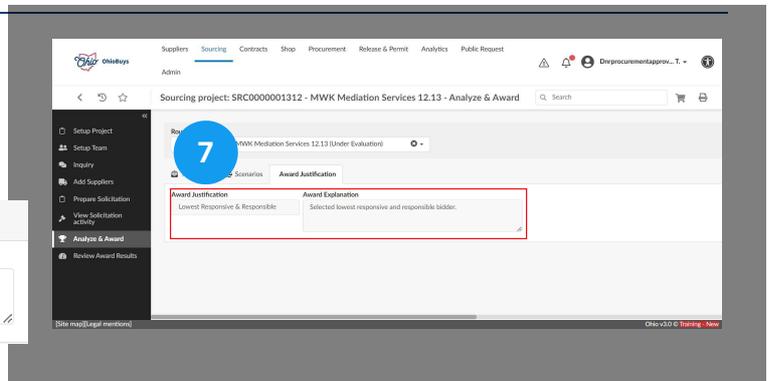
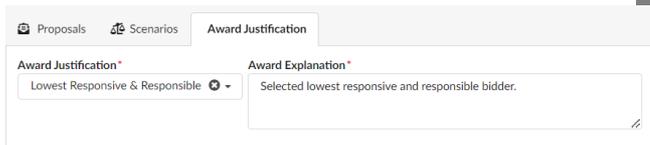
Award Justification Section

6. To review the explanation for the award, return to the Analyze and Award tab and navigate to the **Award Justification** section.



Award Justification and Explanation

7. The **Award Justification** and **Award Explanation** fields are displayed.



▲ Note

For more information on Quick Quotes, please refer to the [Creating and Awarding Quick Quotes](#) book in Opus.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



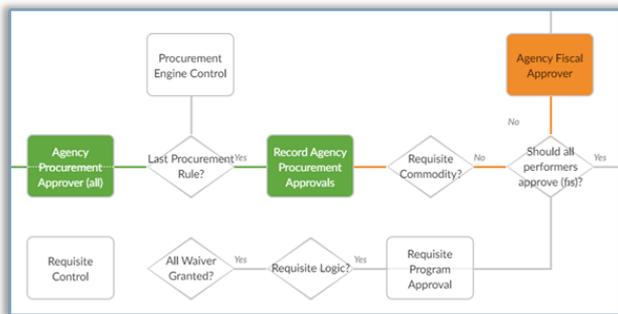
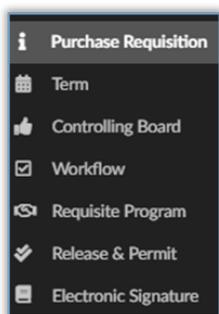
Multiple Agency Approvers

Some agencies have chosen to implement multiple agency approvers at certain steps of the PR approval workflow. For example, an agency can choose to assign multiple users to an Agency Fiscal Approver rule (e.g., order 10), and with these multiple approvals enabled, all users will need to approve a PR before it advances to the next level (i.e., order 20) of that Agency Fiscal Approval rule.

When does a step require multiple approvals?

The simplest way to determine whether or not multiple approvers will be required at a step is to navigate to the **Workflow** tab of the PR and locate the current position in the workflow. As a reminder, the current step of the workflow is highlighted in **Orange** while completed workflow steps are highlighted in **Green**.

Steps where multiple approvers will be required will have the suffix “(all)” at the end of the step name. In the example below, we can see that the Agency Procurement Approver step includes the suffix, while the Agency Fiscal Approver step does not.



In this case, multiple users were required to approve the PR at the Agency Procurement Approver step, however only one of the possible Agency Fiscal Approvers will need to approve the PR to advance in the workflow. Users can also confirm whether multiple approvals will be required by navigating to the Approval History table at the bottom of the Workflow tab. Like the workflow, steps with the suffix “(all)” will require every assigned approver to approve, whereas steps without the suffix require just one approval. For more information on your agency’s approval workflow, please consult with your Agency Admin.

Activity	Name	Delegate to	Created on (UTC-4)	Validated on (UTC-4)	State	Due date (UTC-4)
Agency Fiscal Approver	KIMES PAULA		6/29/2021 11:48:33 AM		○ ●	
Agency Fiscal Approver	BLAND CHER		6/29/2021 11:48:33 AM		○ ●	
Agency Fiscal Approver	CRIDER MATTHEW		6/29/2021 11:48:33 AM		○ ●	
Agency Fiscal Approver	HOLLINGSWORTH MARK		6/29/2021 11:48:33 AM		○ ●	
Agency Fiscal Approver	PINSKER JUSTIN		6/29/2021 11:48:33 AM		○ ●	
Agency Fiscal Approver	HURST JON		6/29/2021 11:48:33 AM		○ ●	
Agency Procurement Approver (all)	RYAN Kyle		6/29/2021 11:28:41 AM	6/29/2021 11:48:33 AM	○ ● ●	
Record Agency Procurement Approvals	RYAN Kyle		6/29/2021 11:48:33 AM	6/29/2021 11:48:33 AM	○ ● ●	
Agency Procurement Approver (all)	GLASS WANDA		6/29/2021 11:28:41 AM	6/29/2021 11:29:39 AM	○ ● ●	

Managing Purchase Requisitions

Topics

- Forwarding a Purchase Requisition
- Duplicating a Purchase
- Cancelling a Purchase
- Sending a Purchase Requisition Document for Signature Using OneSpan Sign
- Using the Notification Bell and Messaging in OhioBuys

OhioBuys Forwarding a Purchase Requisition

Updated: 03/27/2025 03:58 PM

Version: 7.0

1 Purpose & Profiles

This job aid covers forwarding a purchase requisition.

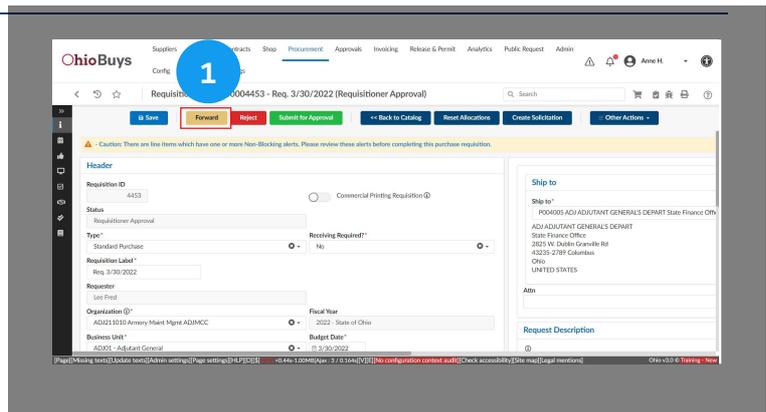
Profiles: Requester, Requisitioner, Agency Procurement Approver, Agency Fiscal Approver, Agency Final Approver, Agency Admin

2 Used When

Reference this when you need to forward a purchase requisition to another user.

Forward a Purchase Requisition

1. After opening the purchase requisition you would like to forward, click the **Forward** button.

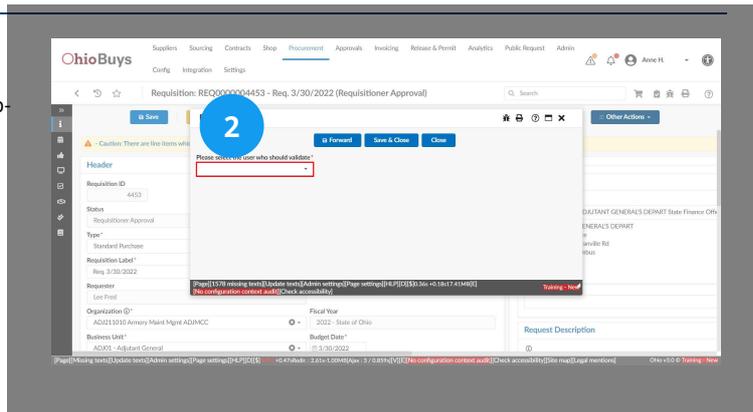
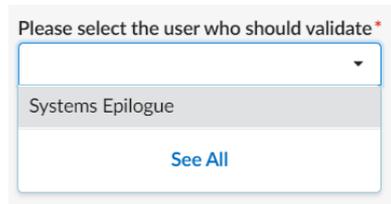


▲ Notes

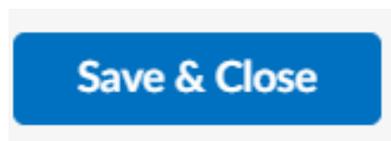
- All purchase requisition approver steps can be forwarded.
- It can only be forwarded to users assigned the Additional Approver role.
- The Additional Approver role is additive. If you need to forward something to a user in your organization and they have not been assigned this role, please consult with your Agency Admin.

Forward activity Pop-Out Window

2. The **Forward activity** pop-out window will appear. Select the user that you would like to forward the approval to from the drop-down menu.



Click **Save & Close** to confirm the purchase requisition is forwarded.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Ohio OhioBuys Duplicating a Purchase

Updated: 03/27/2025 04:01 PM

Version: 7.0

1 Purpose & Profiles

This job aid covers duplicating a purchase requisition.

Profiles: Requesters, Requisitioners

Used When

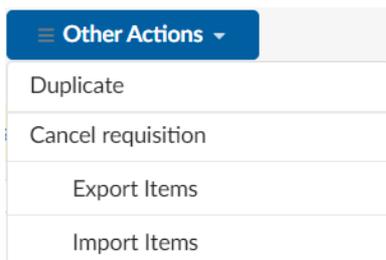
Reference this when you need to duplicate a purchase requisition.

To duplicate a purchase requisition, users must first locate and open the original purchase requisition. Navigate to the **Browse Requisitions** page and search for the purchase you would like to duplicate, then click on the **Pencil** () icon to open it.

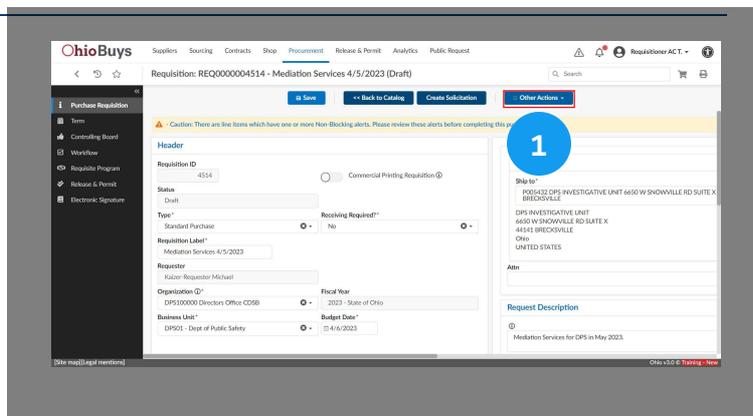
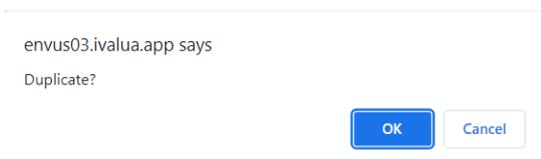
Duplicating a Purchase Requisition

1. Once the purchase requisition details appear, click the **Other Actions** button.

Select **Duplicate** from the drop-down menu.



Click **OK** to confirm.

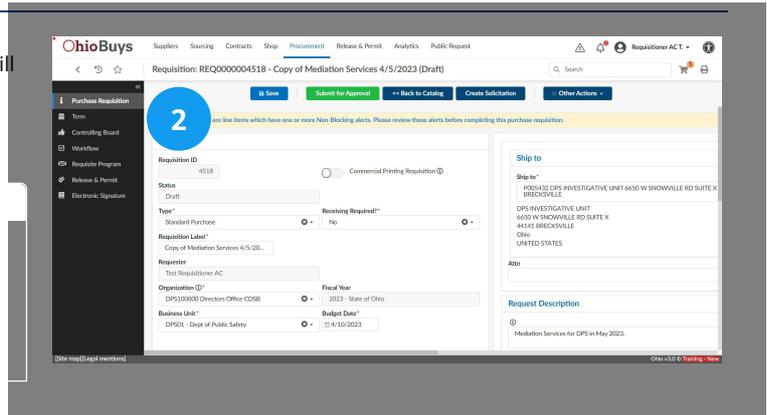


Duplicated Purchase Requisition

2. The duplicated purchase requisition has been created and will have a default label of "Copy of...".

▲ Note

All valid information in the original purchase requisition will be carried into a new draft purchase requisition, with the following exceptions - attachments, Supplier-facing comments, and Pcard details. The new purchase requisition can then be modified and submitted as needed.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771
OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Cancelling a Purchase

Updated: 03/27/2025 04:07 PM

Version: 7.0

📌 Purpose & Profiles

This job aid covers canceling a purchase requisitions.

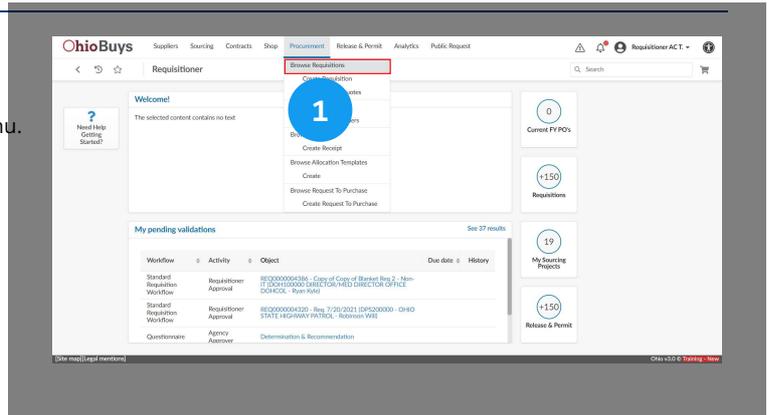
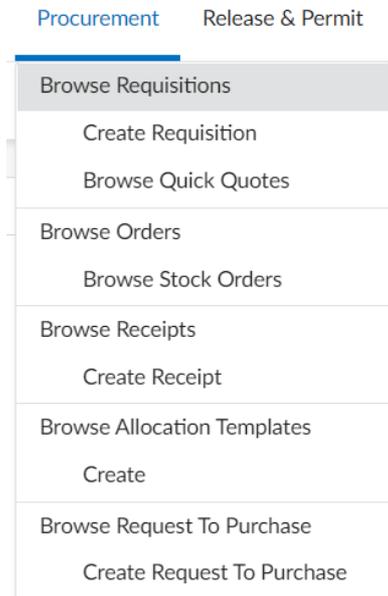
Profiles: Requesters, Requisitioners

📖 Used When

Reference this when you need to cancel a purchase requisition.

Open the Purchase Requisition

1. To cancel a purchase requisition, users must first locate and open the original purchase requisition. Navigate to the **Browse Requisitions** page from the **Procurement** drop-down menu.



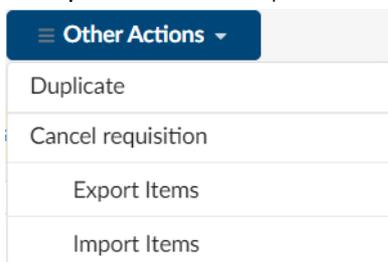
The Browse Requisition page is displayed. From this page, you can search for purchase requisitions in your scope. Click the **Pencil** () icon next to the purchase requisitions you would like to cancel.

Requisition #	Name	Organization	Requester	Req. Amount	PR Status	PR Creation Date
  REC0000004514	Mediation Services 4/5/2023	DPS100000 Directors Office CDSB	Kalzer- Requester Michael	750.00 USD	Draft	4/6/2023

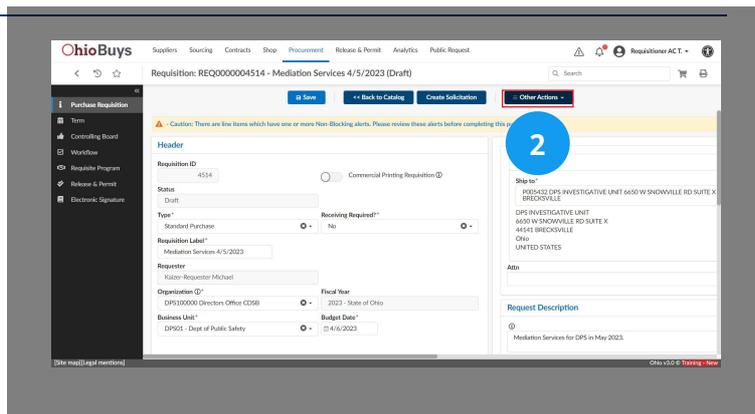
Cancel the Purchase Requisition

2. Once the purchase requisition details appear, click the **Other Actions** button.

Select the **Cancel requisition** from the drop- down menu.



Click **OK** to confirm.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771
OR OBM.ContactCenter@obm.ohio.gov.



Sending a Requisition Document for Signature Using OneSpan Sign

Updated: 03/27/2025 04:11 PM

Version: 3.0

📌 Purpose & Profiles

This job aid covers the process of submitting a document attached to a purchase requisition for signature using OneSpan sign.

Profiles: Requesters, Requisitioners

📖 Used When

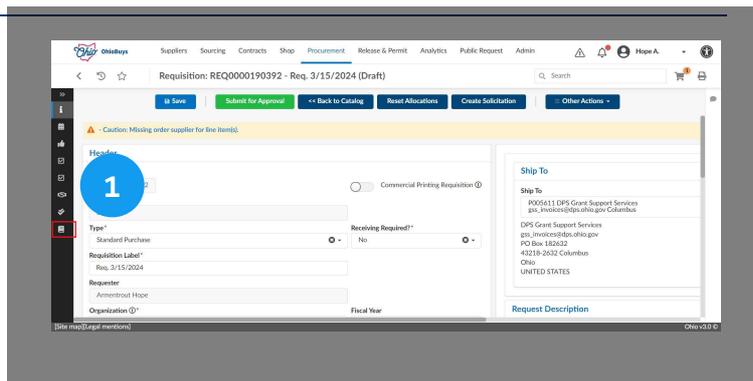
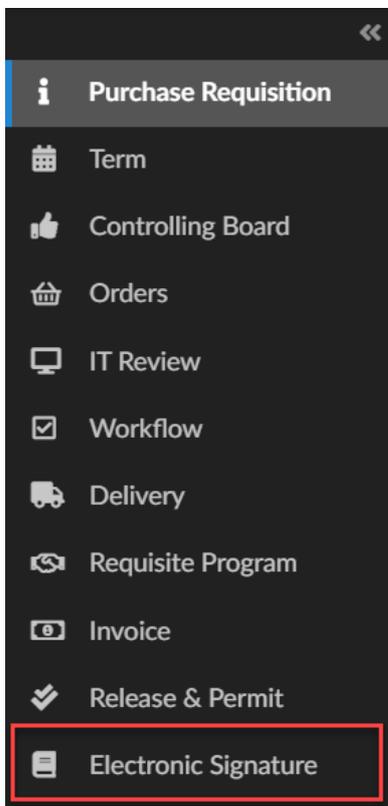
Reference this when you need to obtain a signature on a document attached to a purchase requisition and you would like to do so electronically.

▲ Note

Before attaching a document to a requisition and routing for electronic signature, agencies should consider whether it's more appropriate to create an agency-administered contract in OhioBuys and route associated documents for signatures (e.g., setting up a Memorandum of Understanding with another agency).

Electronic Signature

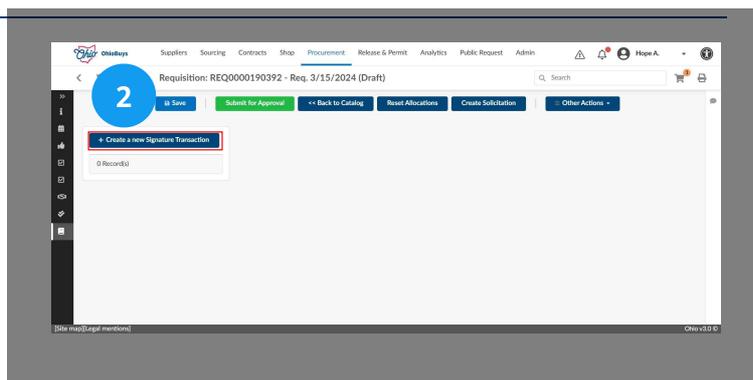
1. Within the purchase requisition that requires a document signature, navigate to the **Electronic Signature** tab.



Create Signature Transaction

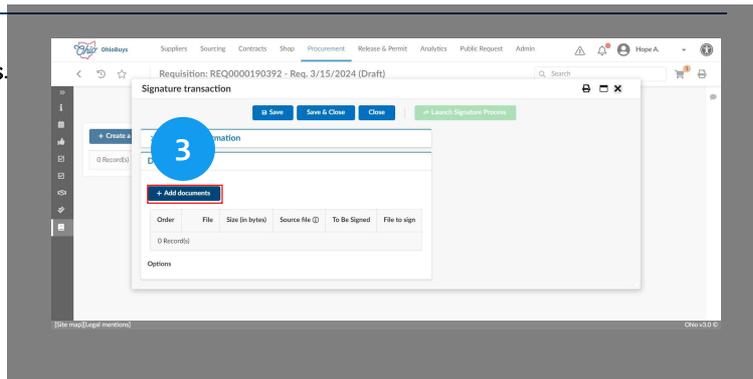
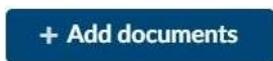
2. Click **Create a new Signature Transaction**.

+ Create a new Signature Transaction



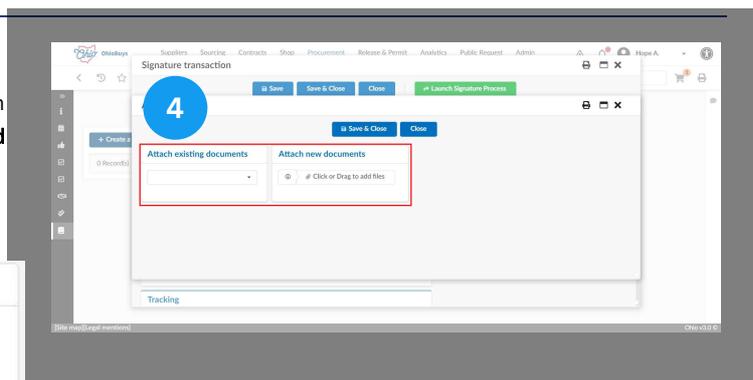
Add Documents

3. In the Documents section of the page, click **+ Add documents**.



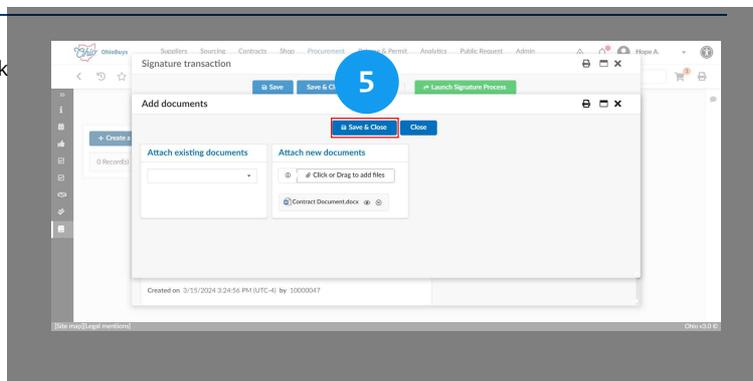
Attach New or Existing Documents

4. On the Add Documents page, users can either **Attach existing documents** by selecting them from the drop-down menu, or **Attach new documents** by using the **Click or Drag to add files** button.



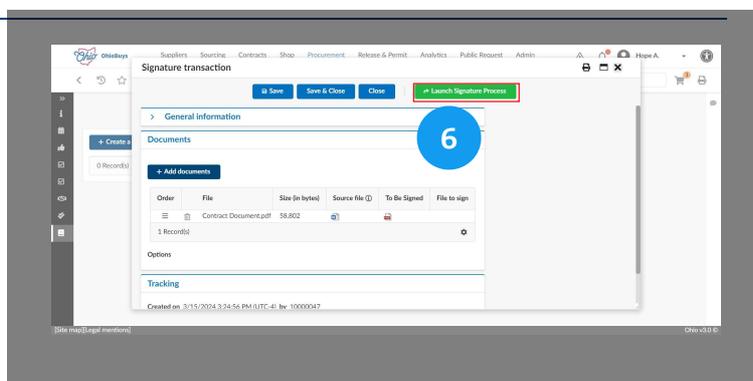
Save & Close

5. After uploading or selecting the documents to be signed, click **Save & Close**.



Launch Signature Process

6. Click **Launch Signature Process**. You will then be routed to OneSpan to complete the signature transaction.



Creating and Managing Purchase Requisitions in OhioBuys Sending a Requisition Document for Signature Using OneSpan Sign

For additional details on setting up a signature in OneSpan, please refer to the following document beginning on **step 4**.

[Send a Contract for Signature Using OneSpan Sign](#)

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771
OR OBM.ContactCenter@obm.ohio.gov.



Using the Notification Bell and Messaging in OhioBuys

Updated: 03/27/2025 04:15 PM

Version: 8.0

1 Purpose & Profiles

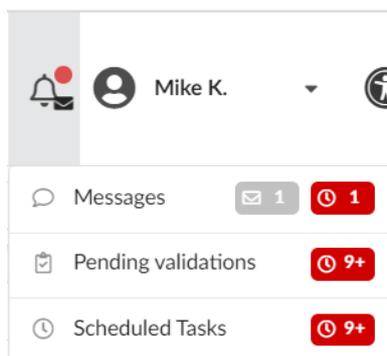
This job aid covers how to use the Message Center in OhioBuys

Profiles: All OhioBuys users

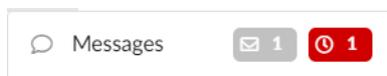
Used When

Reference this when reviewing notifications or sending messages in OhioBuys

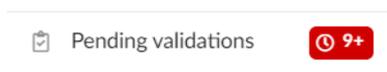
The Notification Bell



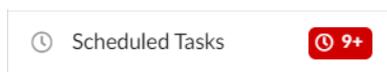
The **Notification Bell** in OhioBuys contains an end user's messages, pending validations, and scheduled tasks. Click the **bell** () icon in the upper right hand corner of any screen in OhioBuys to access the notification bell.



Select the **Messages** pane to access the message center. Here users can send and receive messages with both internal users and Suppliers directly within OhioBuys.



Select the **Pending Validations** pane to access any assigned actions, such as approving a purchase requisition.



Select the **Scheduled Tasks** pane to access any scheduled tasks assigned to you for any Sourcing Projects, Supplier Improvement Plans, or Requirements for a solicitation.

Creating and Managing Purchase Requisitions in OhioBuys Using the Notification Bell and Messaging in OhioBuys

Messaging in OhioBuys can be used to communicate with both State employees and suppliers across a variety of different objects (e.g., purchase requisitions, purchase orders, RTPs, etc.) in OhioBuys. For a message recipient to view the object associated with the message, they will need the appropriate organizational scope and/or profile(s) to access that object.

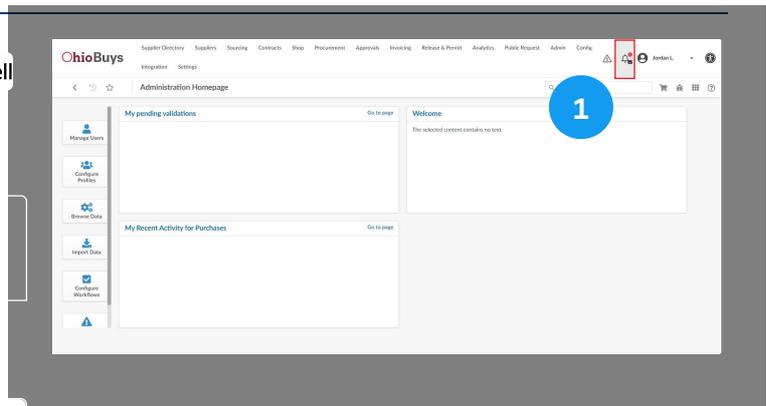
Objects that allow messages to be sent include:

- Purchase Requisitions
- Purchase Orders*
- Requests to Purchase
- Receipts*
- Exceptions
- Performance Evaluation Questionnaires (i.e., Determination & Recommendation (D&R) questionnaires)

*Denotes an object where messages can be sent to Suppliers

Accessing the Message Center

1. From the Main Menu Navigation bar, click the **Notification Bell** icon.



▲ Note

If users have new messages, the Notification Bell will have a black message indicator icon (📧).

Messages

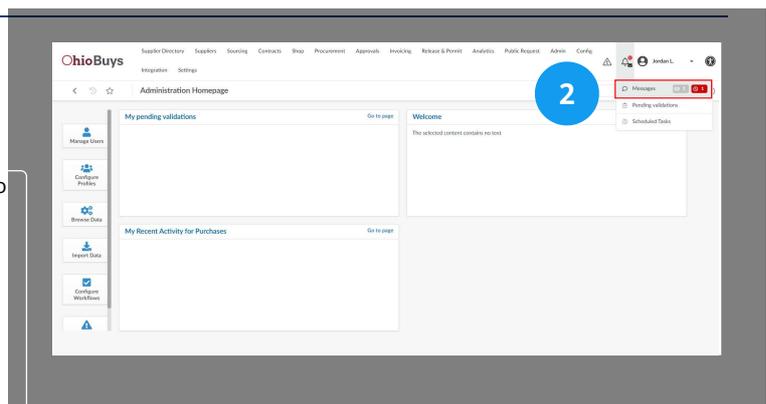
2. Select **Messages** from the drop-down menu.

If users have new messages and/or remaining actions assigned to themselves, the Messages tab will have a grey message indicator icon and/or a red remaining actions icon.

Grey Message Indicator icon



Remaining Actions Assigned to User icon

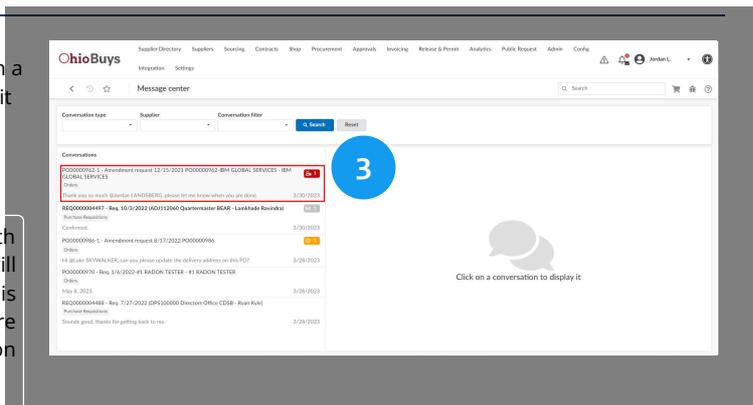


OhioBuys Message Center

3. The Message Center is displayed. Click a message thread with a remaining action for the user in the Conversations Panel to open it in the Message Display Panel.

The Conversations Panel lists all conversations associated with the user unless filters are applied. The Message Display Panel will show the details of a message and available actions once one is selected. Message threads include the content of what users are sending to one another and will also include icons depending on any unread messages or action(s) required.

Remaining Actions Assigned to Others icon



Conversation type
Supplier
Conversation filter

Users can filter their conversation history by:

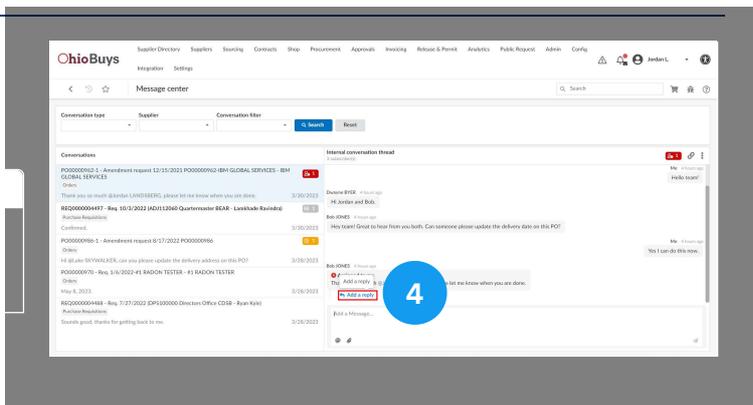
1. Conversation Type – what kind of object the message is associated with
2. Supplier – the supplier associated with the object (if applicable)
3. Conversation Filter – allows users to filter and sort through conversations

Add a Reply

4. Click **Add a reply**.

▲ Note

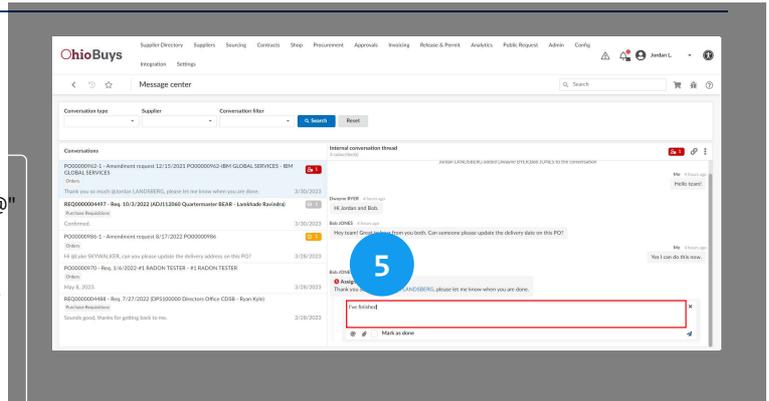
When responding to a message where you have been tagged, users can click **Add a reply** underneath the message to respond directly to the requester.



Response

5. Type your response.

Users will type their response in the **Add a Message...** box. Users have the option to notify others using the **@** icon, or by typing "@" and the intended recipient's name within the body of their message. Users can also upload attachments by clicking the **Attachment** icon. Once a user has completed their response, they can send it by clicking the **Send** icon (or by typing Shift + Enter on their keyboard).



@ icon



Attachment icon



Send icon



▲ Note

When using the **@** icon to notify a user, OhioBuys will display a list of options that will filter down as you type. Begin typing in the user's name (first name, then last name) that you would like to notify, then select it from the list that appears. If multiple users share the same name, it may be easier to add the intended user as a **subscriber** under the More Actions button as described below.

Notified users will receive both an email notification, and a message notification on the Notification Bell in OhioBuys.

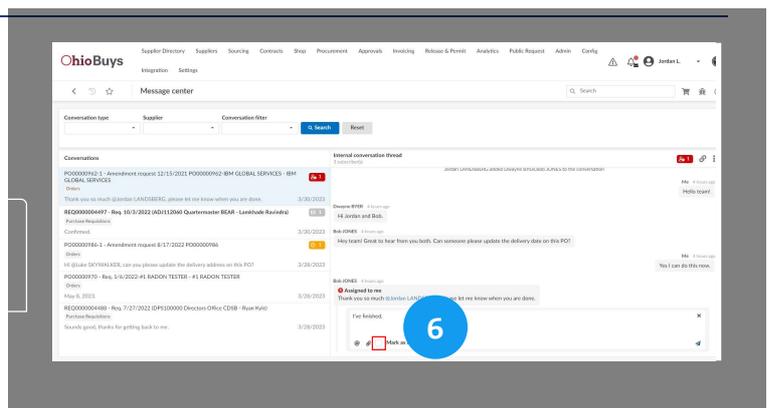
Note that other users **will not** receive a notification if they are not tagged in a message using **@**.

When responding to a message where you have been tagged, users can also click **Add a reply** underneath the message.

Mark Action as Done

6. Click the **Checkbox** icon to mark your assigned action complete.

Checkbox icon

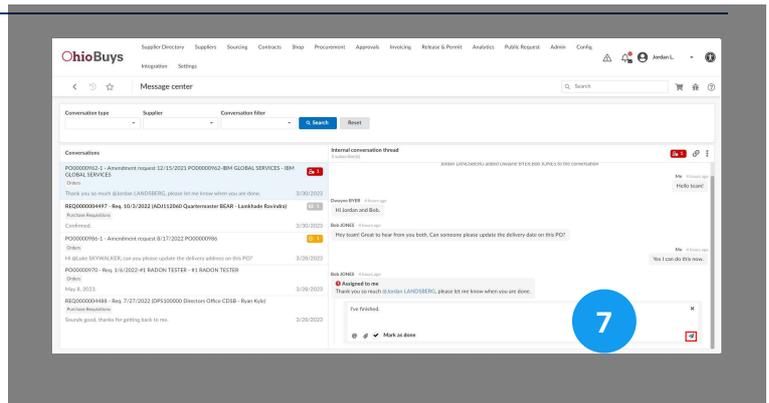


▲ Note

Only users who have been notified will have the ability to mark an action as done.

Send

7. Click the **Send** icon.



Additional Messaging Features

Users can also hover their mouse over a specific message and click the **Reply** icon to reply specifically to one message in a thread. By hovering their mouse over an individual message in the thread users will see the a **More Actions** icon. If the message was sent by another user, users can choose to reply to it directly. If the message is the user's own, the user can either edit or delete the message.

Reply icon



More Actions icon



The **Message Action** icons in the top right corner of the message thread allows users to manage a message thread. The **Link** icon will open the object (e.g., Purchase Order, Receipt) associated with the message in a new tab. The **Archive** icon will archive a message thread. The **More Actions** icon provides additional options for the message thread, including the option to search within the thread and the option to see attachments uploaded in the thread.

Link icon



Archive icon



▲ Note

The **More Actions** () button provides additional options for the message thread, including the option to search within the thread, the option to see attachments uploaded in the thread, the option to see who is subscribed to a thread, the option to subscribe or unsubscribe yourself from the thread, the option to add additional subscribers, and a variety of filters that can be applied to search within the thread.

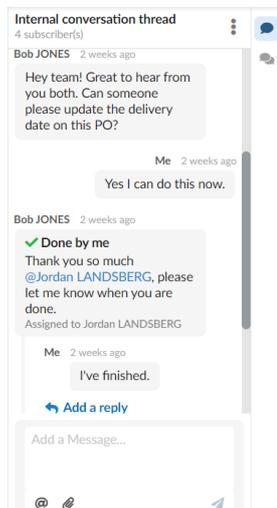
To add additional subscribers, you must first click Subscribe to this conversation. Then after subscribing, click Subscribers and then select Add Internal Users. Once a user is added as a subscriber to a conversation, they will have access to the message history.



By hovering their mouse over an individual message in the thread, users will see an additional **More Actions** item. If the message was sent by another user, users can choose to reply to it directly. If the message is the user's own, the user can either edit or delete the message.

Messaging From Objects

In addition to managing messages via the Message Center, users can view and send messages directly from objects in OhioBuys:



Creating and Managing Purchase Requisitions in OhioBuys Using the Notification Bell and Messaging in OhioBuys

If Messaging is available on an object, the Conversation Thread icon will be visible on the right side of the screen. The Conversation Thread has the same features and functionalities as the Message Center and can be used for convenience.

Conversation Thread icon



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771
OR OBM.ContactCenter@obm.ohio.gov.