Creating and Managing Purchase Requisitions in OhioBuys

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

Published: May 8, 2025 v:9.0



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Introduction

<u>Overview</u>: 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.

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



<u>Punchout Catalog Items</u>: 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.

ID				
Name *		It	em Code	
Ordered Quantity *				
	Each	-		

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.

Ohia Dunca	Suppliers	Sourcing	Contracts	Shop	Procurement	Release & Permit	Analytics	Public Request
OnioBuys	Admin		Browse Cor Signatu	ntracts ures				

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 (\checkmark) 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.

Г	く つ ☆	Contract: CSP90	6618 - LICEN	SE PLATE STICH	KER PRI	NT ON DEMAND. A	mendmen	t #3 (Appro	oval in Pr	ogress)			
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i	Header	Contract Type									Contract Ta	15	
•	Negotiated Terms Contacts	Competitive Select	ion										
	Documents	Update Date											
	Price list												
	Orders Amendment Orders												
ø	Workflow	Quantity	Commodity \$	Product Code ① 💠	Name ©	Product Reference ① 章	Price \$	Currency \$	UOM \$	Validity Start Date ① 🗘	Validity End Date ③ 💠	Tag ≎	Availability
₽	Dealers	• /	Industrial printing services	CSP906618-1	Demand (POD)	Print on Demand (POD) Stickers	0.314	USD	Each	3/1/2023	12/31/2023		
* ≓	Evaluation Subcontractors	1 Record(s)			Stickers								

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

Ohia Duura	Suppliers	Sourcing	Contracts	Shop	Procurement	Release & Permit	Analytics	Public Request
OnioBuys	Admin			Brows	e 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.

ſ				Q Search	Reset]	
	Filters	Tag :	Mandatory- DAS Contract	Mandatory- First Requisite Programs	Mandat	ory- Second Requisite Programs 🔀	MBE Set-aside 🔀

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.

	OhioBuys	Suppliers Sourcin Public Request Ar	g Contra dmin	acts Shop	Procurement R	elease & Permit	Analytics	🔊 🎝 Q Rudi B.	- 🔞
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T	CRP30485-1			Q Sea	arch Reset				T
	Filters Tag: Mandatory- Products: CRP30485-1	DAS Contract × Ma	andatory- Fi	rst Requisite Pr	ograms 🗶 Mandate	ory- Second Requi	site Programs	X MBE Set-aside X Status : Approved	Search
L	→ 0 Selected	Add selection to	o cart	Add to a Sho	pping List Con	pare selection	Add Non-	Catalog Item	
	Quantity	Ima	age (Commodity \$	Product Code (i) 💠	Supplier \$	Name \$	Product Summary	State Contract Nu
	□ / 1 0 •	Add to Cart		Hand sanitizer	CRP30485-1	LOTT INDUSTRIES INC	Liquid Disinfectant Sanitizer 80% Alc. 1 L bottles (case: 12)	Liquid Disinfectant Sanitizer 80% Alc. 1 L bottles (case: 12) (38502) Lott Liquid Hand Sanitizer & Surface Disinfectant 80% Alc. 12/Case 1 L Bottles & Sprayers - Made in USA	CRP30485

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.

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L	₩.	Amendmen	t Orders		1 Result(s))								
	Ø	Workflow												
	<u> </u>	Further												

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

OhiaDuna	Suppliers	Sourcing	Contracts	Shop	Procurement	Release & Permit	Analytics	Public Request
OnioBuys	Admin			Brows	e 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.

Creating and Managing Purchase Requisitions in OhioBuys

	Filters	Tag : Mar	ndatory- DAS C	ontract	Mandatory	Q Se	arch R ograms 🔀	eset Mandatory-	Second Requisite Programs 🔀 MB	E Set-aside 🔀
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Ţ	Filters Tag	: Mandatory Selected Juantity	DAS Contract × Add selec	Mandato	ry- First Requisite Add to a S Commodity \$	Search Reset Programs × Mand hopping List C Product Code ① CRP30485-1	atory- Second Re ompare selection Supplier •	Add N Name ¢ Liquid Disinfectant Sanitizer	ns × MBE Set-aside × Status : Approv on-Catalog Item Product Summary Liquid Disinfectant Sanitizer 80% Alc. 1 L bottle (case: 12) (38502) Luct Liquid Hand Sanitizer & Surface	ed State Contract Number CRP30485
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	- / :	n o -	Add to Cart	x	Hand sanitizer	CRP30485-3	LOTT INDUSTRIES INC	Liquid Disinfectant Sanitizer 80% Alc. 270 gal- tote	Liquid Disinfectant Sanitizer 80% Alc. 270 gal-tote (38504) Liquid Disinfectant Sanitizer 80% Alc. 270 gal-tote - Made in USA	CRP30485

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

⊷ 0	Selected	Add selection	on to cart	Add to a Shopping List	ping List Compare selectio					
	Quantity	Image	Commodity a	Product Code () \product	Supplier 😄	Name 👳				
1	⊯₩⇔⊕	X	Paper Materials and Products	Amazon Punchout	AMAZON COM LLC	Amazon Punchout				

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.

く つ ☆	Contract: CSP90	6618 - LICEN	SE PLATE STIC	KER PRII	NT ON DEMAND. A	mendment	#3 (Appro	val in Pr	ogress)			
« Contract tree view							🗎 Save		ixtract all Documents to Zip	File		
Header Negotiated Terms	Contract Type Competitive Select	tion								Contract Tag	15	
Documents Price list	Update Date											
Orders Amendment Orders	Quantity	Commodity \$	Product Code ① 0	Name 0	Product Reference ① ©	Price ¢	Currency ©	UOM 0	Validity Start Date ① 0	Validity End Date ① 0	Tag 0	Availability
Dealers Evaluation	• •	Industrial printing services	CSP906618-1	Print on Demand (POD) Stickers	Print on Demand (POD) Stickers	0.314	USD	Each	3/1/2023	12/31/2023		
≓ Subcontractors	1 Record(s)											

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

Ohia Duura	Suppliers	Sourcing	Contracts	Shop	Procurement	Release & Permit	Analytics	Public Request
Оповиуя	Admin			Browse	e 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.

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Filters Tag	: Manda	itory- DAS Cont	selection t	Aandatory- Fir	rst Requisite Progra	ms × Mandat	tory- Second Re -Catalog Item	oquisite Programs X MBE Set-aside X 5	tatus : Approved						6	Disp
•••(1 -	Quantity	image	Commodity Ball point pens	Product Code () CRP30502-67	Supplier CENTER FOR INDIVIDUAL & FAMILY SERVICES	Name Bic Cristal Clear Ballpoint Pen	Product Summary Bic Cristal Clear Balgoint Pen (HS11BR) Bic Cristal Clear Balgoint Pen, 2-Proce Cap- off Sinke, medium point, 12 pens per box. Available in black trim wriback ink, blue trim wribac kik and red trim write full. Meliniaam order cauntity 1 dozen, minimum order 520.00.	State Contract Number	GDC701	Manufacturer	Price Val 4.100	idity Start Date Vali	dity End Date EOD	itatus Tag Li	ski
••[1 -	Add to Cart	×	Ball point pens	CRP30502-68	CENTER FOR INDIVIDUAL & FAMILY SERVICES	Paper Mate Quatro Retractable Ballpoint Pen	Paper Mate Quatro Retractable Ballpoint Pen (195338) Paper Mate Inkjøy Quatro Retractable Ballpoint Pen, 12 pens per box, Medium Point, comfortable grijo, retractable design with 4 coloris in each pen (red, blue, bluck and green). Minimum order quantity 1 dogen, Minimum order QuaD.0.	CRP30502	GDC701	Paper Mate	25.800	5/5/2021	3/31/2024	R	
••[1 •	Add to Cart	X	Ball point pens	CRP30502-69	CENTER FOR INDIVIDUAL & FAMILY SERVICES	Countertop Ballpoint Pen with Chain	Countertop Ballpoint Pen with Chain (TTA3844800) Integra Artimisrobial Rubber Barrel Countertop Pen with chain. Black Ink only. 12 pens per box. Minimum order quantity 1 dozen, minimum order 50.00	CRP30502	GDC701	The Center for Individual and Family Services	43.920	5/5/2021	3/31/2024	R	
••[1 •	Add to Cart	X	Ball point pens	CRP30502-70	CENTER FOR INDIVIDUAL & FAMILY SERVICES	Countertop Ballpoint Pen Replacement	Countertop Ballpoint Pen Replacement (ITA3864680) Integra Antimicrobial Rubber Barrel Countertop: Replacement Pen with chain connector. Metal connector attaches easily to ball chain for immediate use. Black link only, 12 per bas. Minimum order quantify 1	CRP30502	GDC701	The Center for Individual & Family Services	42.480	5/5/2021	3/31/2024	R	

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.

Creating and Managing Purchase Requisitions in OhioBuys

»	REQ0000105862 - O → Req. 2/22/2023						
×	Print on Demand (POD) Stick						
То	tal (Excl. Tax)						
_	0.31 USD						
	Checkout						

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.

 Control Control Contr	. •	Rudi B.	¢• 0		Analytics	Procurement Release & Permit	Contracts Shop	Sourcing (t Admin	uppliers ublic Reques	s ۹	nio Bu
Items & Services Add a line Delete Lines Copy Selected Lines Edit Lines Image: Copy Selected Lines Edit Lines Copy Selected Lines Edit Lines Image: Copy Selected Lines Edit Lines Copy Selected Lines Edit Lines Image: Copy Selected Lines Edit Lines Copy Selected Lines Edit Lines Image: Copy Selected Lines Edit Lines Copy Selected Lines Copy Selected Lines Edit Lines Image: Copy Selected Lines Edit Lines Copy Selected Lines Edit Lines Copy Selected Lines) <mark>1</mark>			Q, Search		q. 2/22/2023 (Draft)	00105862 - Re	n: REQ00	equisitio	රු R	5 T
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# Ref. Item description Supplier Ordered Quantity Unit Price 105862-1 Print on Demand (POD) Stickers Print on Demand (POD) Stickers (3M COMPANY) 1.00 Each 0.314							Quick Quote	locations	Set A	0 Selected	-
▲ 105862-1 Print on Demand (POD) Stickers Print on Demand (POD) Stickers (3M COMPANY) 1.00 Each 0.314	a Tota	Price \$	Unit \$	Ordered Quantity \$	Supplier \$	Item description \$	\$	Ref.	# 0		
	0.31	0.314	Each	1.00	(3M COMPANY)	Print on Demand (POD) Stickers	mand (POD) Stickers	Print on De	105862-1	1	
1 Record(s)										ecord(s)	1 Rec

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.

Pricing	
0.3140 USD	
Total Amount 0.314	
Supplier Quote ID (]
Do you want to apply a Speed Chart?	
O No	
Speed Chart can be applied ①	

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.

< "D 🕁	Contract	
«	(i)	
i Header	Contract Type	Contract Tags
Negotiated Terms	Competitive Selection	
📽 Contacts		
Documents	0 Result(s)	
Price list		

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).



Updated: 03/28/2025 03:45 PM

Version: 9.0

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:

Requisitioner AC T	Ì
A My Profile	
My addresses	
🗈 Logout	



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.

Creating and Managing Purchase Requisitions in OhioBuys Updating a User Profile in OhioBuys

My Profile



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.

< 3 4	Profile Managem	ent : Requisitioner AC TE	ST			Q, fearch	H
repaintment, text, as	100	ac@test.com					
Position ①	Ep.n	ole account			÷		
				Default settings			
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		Tracking		Receiver's Site Location			
					•		
		by alcohandrocardiacci@lige	ali com	Favorite Departments	0.		
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Address Line 2							
My preferences							

Default settings	
Main Agency	
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Main Organization	
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Ship to	
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Creating and Managing Purchase Requisitions in OhioBuys Updating a User Profile in OhioBuys

Favorite Department

When choosing your Favorite Departments, you will need to	く '③ ☆ Profile I	Management : Requisitioner	AC TEST		Q, Search	3
ect See All.	» ☆		B Save			
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		Tracking		R A		
See All		by alessandrocard	acci@kpmg.com	Favorite Departments		
		Modified on 12/3	2018 1:57:32 PM (UTC-4) by requisitioner_test_ac			-
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	Nite ward (I want exceptions)					China Car Taraba

Clearing the Favorite Department Filter

5. To search for Departments, clear the filter that is automatically	OhioBuys Supplier/Directory Suppliers Sourching Contracts Shop < < ☆ Profile Management : Requisitioner AC TEST <th>Procurrement Rolesse & Permit Analytics Public Request 🖉 🖓 🚱 Requiridizerer ACT 🕼 Q. Search 🦷</th>	Procurrement Rolesse & Permit Analytics Public Request 🖉 🖓 🚱 Requiridizerer ACT 🕼 Q. Search 🦷
applied by clicking the X icon next to your name.	First Num ² F	
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	Modified on 12/3/2018 1:57:32 PM JUT	- 4 by maniform test ac
	Zip Code City Country (Site mode)(Report Providence)	. + Churdo D'holeg ster

Searching for Favorite Departments

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

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O Search		eywords
o, Jearch	Q 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.

AAMPRIOR - CONVERSION



Pcard Management



Entering Pcard Information



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.



-		-			
>>		Pcard Management		e 🗆 x	
Ω		Save & Close	C+		
2					
•	LIST	User Login	10		
Ϋ́	Franklus	TEST Requisitioner AC	th Supplier		
	Foolish United States	Pcard Label*			
	Date format				
	4/3/2023 1:11:49 P5	Name (as it appears on your card)*			
	Number format				
	-1.234.567.89	Card Number (no dashes or spaces) (1)*			
	Pcard Managemen	Expiration Month*	Expiration Year*		
				•	
	Add Dund	Security Code*			
	AUGPCARG				
	Browl Jabel A	Card Provider			
	Main Card				
	1 Record(s)	٥			
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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



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.

Browse Items



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.





<u>Item Tags</u>

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

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

Q Search

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.

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	temp	orary personi	nel services			Q. Search	R							π
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	Add	Neo-Catalos	Item											
		Quantity	Image	Commodity	Product Code ()	Supplier p	Name o	Product Summary	Manufacturer 0	Price ©	Validity Start Date 👳	Validity End Date o	Tag o Availabilit	y Index Numbe
	0 Rec	ord(s)												
-		manhoral											Others	O C Tracing - New

Advanced Search

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

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	O Selected Add selection to c Quantity Image	e Commodity o	Product Code () o	Supplier 0	Add Non-Cata	Product Summary	Manufacturer 0	Price 0	Validity Start 0
	2 1 O - Addite Cart	Masking tape	C8P30004-3-49- 6707	ONCINNATI ASSOCIATION FOR THE BUIND	Masking Tape, Utility, 37, 16 rolls per case	Masking Tope, Utility, 3*, 16 rolls per case (3-49-6707) General purpose masking tape protectscontoured or rounded surfaces from being marred by pairs, venible, or other finishingmaterial. Creape paper backing adds strength, which is involuable during tape removal. Restant to moisture and sulvents.	34	74.400	4/4
	Add to Cart	Masking tape	C8930004-3-49- 6708	CINCINNATI ASSOCIATION FOR THE BUND	Masking Tape, Utility, 4*, 12 rolls per case	Masking Tape, Utility, 4", 12 rolls per case (3-49-6708) General-purpose masking tape protectscontoured or rounded surfaces from being marend by pairk, wmish, or other finishingmaterials. Group paper backing adds strength, which is involuable during tape removal. Resistant to moliture	324	69.480	4/4

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.

Q Search Reset	
Tag	
Mandatory- DAS Contract ×	Θ-
Mandatory- First Requisite Programs	
Mandatory- Second Requisite	
Do not show comparison Items (i)	
Commodity	
	•
Contract	
	•
Supplier	
	-
Show non valid items	
Punchout only	
Generic Product	
MBDD Status	
	•

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.

1 11	1	0 -	Add to Cart

T		Status : App	oved	Q, Search	Reset					
	Add	selection to cart	Add to	a Shopping List	Compare selec	tion Add Non-O	latalog item			
	Quantity	Image	Supplier 0	Commodity 0	Name 0	Product Code () 0	Product Summary	Manufacturer 0	Price 0	Validity Start Date
	🛩 🖉 1 🛛 e 🔹 Add to Car	3	INGENESIS INC	Temporary personnel services	MSP FEE FOR NON-IT STAFF AUGMENTATION SERVICES	C5P900917-1	MSP FEE FOR NON-IT STAFF AUGMENTATION SERVICES (30193) MANAGED SERVICES PROVIDER FOR NON-IT STAFF AUGMENTATION SERVICES	INGENESIS INC	0.000	4/12/2023
	🖉 1 🔍 Add to Car		INGENESIS INC	Temporary personnel services	HOURLY STAFFING FEE FOR NON-IT STAFF AUGMENTATION SERVICES	C5P900917-2	HOURLY STAFFING FEE FOR NON-IT STAFF AUGMENTATION SERVICES (20194) MAMAGED SERVICES PROVIDER FOR NON-IT STAFF AUGMENTATION SERVICES	INGENESIS INC	0.000	4/12/2023
	2 Record(s)									

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.

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Grid column settings	
Select all rows	C
Editing column	C
Deleting column	C
Quantity	C
Image	C
Draduct Cada	

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 <u>OBM.ContactCenter@obm.ohio.gov</u>.



Updated: 03/28/2025 03:49 PM

Version: 10.0

• Purpose & Profiles

This job aid covers how to submit a punchout catalog purchase requisition in OhioBuys. **Profiles**: Requester, Requisitioner

Used When

Reference this when purchasing an item from a punchout catalog.

Shop: Browse Items

1. Log in to Oh over Shop and th menu.	ioBuys. From the N len select Browse	Main Menu Navigation bar, l I tems from the drop-down	hover Chioe	Utys baselin brance baselin Grade in the second secon	ernet Audultis Public Reserve Admin	Current FY POY	(+150) Requiritions	A O O O O	ank -
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	Shop	Procure		My Shopping Lists	Ge to page				
	Browse	e Items							

More Filters



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

More Filters icon

T

Punchout Only Checkbox

Checkbox icon

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



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.



Search

4. Click Search.

Q 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





Users can order items from the punchout catalog and will be returned to OhioBuys with the items from the Supplier's punchout catalog already added to your shopping cart. Supplier punchout catalogs are unique and what users see in each catalog will depend on which is selected.

🔺 Note

Punchout catalog items' prices may change as updates are reviewed and approved by Contract Analysts. Punchout catalog item pricing may change at any time without approval of a Contract Analyst unless the item is a Market Basket item. Market Basket items are listed in a contract's terms and maintain firm pricing for one year from the contract's inception.

Checkout

6. After completing the carting on the punchout catalog Supplier's website, users will be brought back into OhioBuys to complete the checkout process. Click the **Shopping Cart** icon.





Checkout

7. Click Checkout.

Checkout



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.

Mandatory- DAS Contract X Mandatory- First Requisite Programs X Mandatory- Second Requisite Programs X MBE Set-aside

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			1	0	M	d to Cart		cleaning services for parks and	C#730517-1	GOODWILL EASTER SEALS	Care Services, Boadside	Rest Areas 1-01 & 1-02 (CRP30617-1) Janitorial & Lawn Care Services, Roadside	C8P30617	DOT814	Goodwill Easter Seals	907.000	7/1/2022	
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		/ 1	1	0	A	d to Cart		parks and outdoor public venues	CR#90621-2	TWIN CEDARS SERVICES INC	Suntorial & Lawn Care Services	Janitorial Services, Primitive Roschide Rost. Area 8-03 US Route 52 EB MM 50:03, New Richmond, OH 45137	C#P30621	D01842	Twin Cedars Services, Inc.	60.000	7/1/2022	
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Item(s) Search

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

Q Search



Add Item(s) to Cart

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

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ayunna Otah Mat	1	0 -	Add to Cart	
(meaning) (thrut portio				engernati Osah Allas (maami Bitrat postos



Checkout

1. 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.



Updated: 05/05/2025 08:43 PM

Version: 16.0

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

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.

Reset

Q Search

Shop: Browse Items



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.

Filters Tag : Mandatory- DAS Contract X Mandatory- First Requisite Program

Q Search

	3				Q, Search	Reset							×
Filte	rs Tag: Manda	tory- DAS (Contract x Ma	ndatory- First Requ	isite Programs 🗙	Mandati	ory- Second Requisite	Programs × MB	E Set-aside	× Status : Approve	ed Search Products :		
Me	diation Services	×											
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6	Quantity	Image	Commodity 0	Product Code ()	o Supplier o	Name o	Product Summary	Manufacturer o	Price o	Validity Start Date	Validity End Date o	Tag 0	Availabilit
0	Record(s)												

Keywords 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**.



Add Non-Catalog Item

A 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.

T Mediation Ser	Describe the item		Select Supplier	3
Filters Status :	A ID		Supplier	
	Name"	tem Code	Order Supplier (1)	
6	Ordered Qty () *		Supplier Contact	
	AMT O-		•	e o Tag o Availabili
O Records)	Commodity*	Profile ID	Supplier Location (1)	
		•		
	Products types*	MBE Set Aside	Itre Nee-Default Surplier Location	
	Delawa Date	· · · · · ·		
			Dealers Available	
	Product Code		Controlling Board Number ()	
			Ψ.	

Mandatory Freeform Item Fields

Name*	Item Code
Ordered Qty (1)*	
Commodity*	Profile ID
Products types*	MBE Set Aside
Yes Delivery Date*	©

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 (<u>https://www.unspsc.org/search-code</u>) 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.

Select Supplier	
Supplier	
Order Supplier 🛈	•
	•



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

Supplier Contact

🔺 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.

Pricing		
100	USD	
Total Amount		
0.000		
Supplier Quote ID (

T Mediation Ser	vic O No		
Filters	Pricing	Define delivery place	
8	Total Amount 0.000	Ship to Ship to	
Quan	Supplier Quote ID ()		e o Tag o Availabili
O RECORDS	Do you want to apply a Speed Chart? Vies No 	Attn	
	Speed Chart can be applied Ø		
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Select applicable contract number

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

*



🔺 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



🔺 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.

 Workflow Main A 	pprovals								
Purchase Requisition 0	Activity 0	Approval Type 0	Approved 0	Name 0	Order 0	Performed by 0	Validated on (UTC-5) 0	ID 0	Agency
Reg. 2/23/2023	Procurement	37		Chapa Jarrod	10			1629466	DPS-Dept of Public Safety
Reg. 2/23/2023	Procurement	37		Whalen Kelli	10			1629467	DPS-Dept of Public Safety
Req. 2/23/2023	Procurement	37		Dripps 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.



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 nonmandatory 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.

- O Action Required: There are line items that have one or more Blocking Alerts.
- A 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 <u>OhioBuys training</u> website.

Mandatory Purchase Requisition Header Fields

Commercial Printing Requisition ③
Receiving Required?*
No 🕲 -
Fiscal Year
Budget Date*
₩ 7/25/2024

- **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

		O	nioBuys supplers	Sourcing Contracts Shop	Procurement Rolease & I	Parmit Analytics Public Reque	st Admin	A	스 슈º 🕒 Michael K 🔞
2. Scroll to the right to enter the Shir	To address. Bill To addre	ess.	🗇 🏠 Requisiti	ion: REQ0000004513 - Ref	q. 4/5/2023 (Draft)			Q, Search	¥ [₽] ⊕
_, _, _, _, _, _, _, _, _, _, _, _, _, _	,	>> i #	2	8 Save	Submit for Approval	Kenet A Reset A	docations 0	her Actions +	_
		0	Ship to					Bill To	
Ship to		Bill To	Ship to'	+			+	BUR To 1	_
Ship to" +		Bill To*	Description -						
			©						
			Comments to Supplier						

🔺 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.

Ship to	
Ship to	
	• +

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

Autress morma	non(i)	
Address Code		
Address Label ③		
Address Line 1 (i)		
Address Line 2	ss, a place, a monument or coordina	Address Line 3
Zip Code	City	
Country	State/Province ①	

- 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		
(i)		

**	>> Submit for Approval << Back to Catalog Reset			Reset Allocations	t Allocations = Other Actions +				
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	uest Descripti	on							
*	0								
8									
	Comments to Sup	plier							
Site map Thread r	rentions]						_	Ohio v3.0 © 17	ining - N

🔺 Note

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

Comments to Supplier

Comments to Supplier

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

< "9	Requisition: REQ0000004512 - Req. 4/5/2023 (Draft)	Q, Search	
»	B Save Submit for Approval << Back to Catalog Reset Al	Other Actions +	
1			
8			
9	Request Description		
<i>"</i>	0		
	distion Services for DPS in May 2023.		
	4		
	ments to Supplier		

🔺 Note

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

Save

5. Click Save.



**	a Save Approval << Back to Catalog Reset Allocations	= Other Actions +	
1 10	5		
Ø	Request Description		
0	0		
ē	Mediation Services for DPS in May 2023.		
	Comments to Supplier		
	Please contact the Requester.		

🔺 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:

Your transaction has been saved. Click Cancel to save your existing COA values and the updates you have made. Click OK to clear all existing COA values, except for the Account and Organization fields.

- 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.

Add Attachment Keywords	Attachments -	Internal, S	Supplier, and	Justification (i)	
Keywords	Add Attachment				
	Keywords				
Q Search Reset			Q 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.

Add a line	Del	ete Lines	Copy S	electe
➡ 0 Se	lected	Set Allo	cations	
	#	Ref.		÷



🔺 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*			Item Code	
Mediation Services				
Ordered Qty ()*				
1.00	AMT	Θ-		
Commodity*			Profile ID	
80121707 - Labor dis	putes law services	0 -		•
Products types*			MBE Set Aside	
Services		0 -	N	0 -
Product Code				
Continuation?				
O 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	© -	6
Order Supplier (1)		
BREEN LAW FIRM LLC	© -	6
Supplier Contact		
V BREEN DAVID	© -	
Supplier Location ③		
СНК		
Use Non-Default Supplier Location Dealers Available		
Use Non-Default Supplier Location Dealers Available Controlling Board Number ①		

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 (i)	
Do you want to apply a	Speed Chart?
◯ Yes	
O No	
Speed Chart can be	applied (1)

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 <u>Create and Release a Quick Quote Solicitation Job Aid</u> for instructions on how to conduct a quick quote.

Ship to		
Ship to		
P005432 DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X BRECKSVILLE	© -	+
DPS INVESTIGATIVE UNIT		
5650 W SNOWVILLE RD SUITE X		
44141 BRECKSVILLE		
Dhio		
JNITED 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.

Apply Order Supplier/Contact To All Line Items

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.

	×	ermit n Informatio	n											
	Budget Ir + Allocatio	To be alk	cated 0.000	USD										1
	Duplicate o	ID o	Fund Code	Account	ALI	Department	Program	Grant/Project	Project	Service Location	Report	Agency Use	ISTV Xiref	v
	ø	12929		•						•			•	65
	1 Record(s)													ł
L	 Contra 	ct Funding												

Save & Close



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**.

Workflow Main Approvals

JNIOBUYS Suppliers Sourcing	Contrac	ts Shop Procurement Release & Permit Analytic	is Public Request Admin 🖉 🖓 🔮 Michael K. 🔹 🔮						
く 当 会 Requisition: REQ	000000	4512 - Mediation Services 4/5/2023 (Draft)	Q. Search 🗧 🗧						
B Sav	•	Submit for Approval << Back to Catalog Re	= Other Actions +						
A - Caution: There are line items which have or	e or more l	Non Please review these sleets before complete	ing this number multiling						
		10							
Header		TO							
Requisition ID			Ship to						
4512		Commercial Printing Requisition ()	Sha ta'						
Status		0	Ship to "						
Draft			BRECKSVILLE						
Type*		Receiving Required?*	DPS INVESTIGATIVE UNIT						
Standard Purchase	0 -	No Or	6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE						
Requisition Label*			Ohio						
Mediation Services 4/5/2023			UNITED STATES						
Requester									
Kaizer-Requester Michael									
Organization () *		Fiscal Year							
DPS100000 Directors Office CDSB	0 -	2023 - State of Ohio	Desuest Decedeties						
e map[[Legal mentions]			Ohio v3.0 © Training - Ne						

Submit for Approval

A 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.

Purchase Requisition \$	Activity 0	Approval Type \$	Approved \$	Name	Orde	r ¢	Performed by \$	Validated on (UTC-5) \Leftrightarrow	ID	٥	Agency	٥
Req. 2/23/2023	Procurement	37		Chapa Jarrod		10			162946	6	DPS-Dept of Public Safety	
Reg. 2/23/2023	Procurement	37		Whalen Kelli		10			162946	7	DPS-Dept of Public Safety	
Req. 2/23/2023	Procurement	37		Dripps Jeffrey		10			162947	0	DPS-Dept of Public Safety	
3 Record(s)											4	¢

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 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.

Requisition ID		
143270		Commercial Printing Requisition
Status		
Draft		Pcard Exception?
Type "		Receiving Required?*
Pcard Purchase	© -	No

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



Pcard Exception?

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	

く ⑤ ☆ Requisition: REQI	0000004548 - Req. 4/17/2023 (Dr.	ift)	Q, Search	¥. 8
a Save	Submit for Approval << Back to	Catalog Reset Allocations Create Solicitation	= Other Actions -	
A - Caution: There are line items which have on	e or more Non-Blocking alerts. Please review the	se alerts before completing this purchase requisition.		
Head				
		Commercial Printing Requisition @		
St.				
Type '		Receiving Required?"		
Standard Purchase	0 -	No	0 -	
Requisition Label*				
Populating *				
Training DASRequisitioner01	0 -			
Organization (3*		Fiscal Year		
	•			
Business Unit		Budget Date*		
		<i>□</i> 4/1//2023		

Purchase Requisition Header Information

Header		
Requisition ID 4568		Commercial Printing Requisition (1)
Status		
Draft		
Туре*		Receiving Required?*
Standard Purchase	0 -	No 🕲 🗸
Requisition Label*		
Requester		
Kaizer Mike		
Organization ()*		Fiscal Year
DPS100000 Directors Office CDSB	0 -	2023 - State of Ohio
Business Unit*		Budget Date*
DPS01 - Dept of Public Safety	0 -	iiii 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.

- 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.

Ship to	
Ship to	
	· +

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

Address Inform	nation	
Address Code		
Address Label 🛈		
Address Line 1 (i)		
Search for an ad	dress, a place, a monument or coordina	. 🕭
Address Line 2		Address Line 3
Zip Code	City	
Country	State/Province ①	
	•	

- 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.

Creating and Managing Purchase Requisitions in OhioBuys Submitting a Pcard Purchase

DOT Note	
When creating a Header. After cor	Pcard purchase for DOT, additional mandatory and optional fields will appear on the purchase requisition npleting the Organization field, the following fields will become visible in the DOT section:
	~ DOT
	DOT District *
	• DOT County*
	• DOT Project Number
	DOTAgreement
	PID T
	ITPR Number
DOT Distric	t (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

Pcard

Select applicable Pcard*

My 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.

	Supposed Soc	intra connect	- Hocarcinen	HERADE & FERRE	Perarpical Found in	Appent Phillip	A 4 8 W	requisitioneros i. *
< <u>2</u>	Requisition:	REQ0000045	18 - Req. 4/17/20	23 (Draft)			Q, Search	¥" 8
	85	ave Sub	nit for Approval	· Back to Catalog	Reset Allocations	Create Solicitation	= Other Actions +	
Pcard								
Select applicable Pca	rd*							
My Pcard	0.							

🔺 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.

0.

Save My Requisition



tem				
		🖬 Sav	e Save & Close	Close Reset Allocations Save & New
 Action Required: T Info: A supplier contained Caution: When "A" 	he "Order Supplier" field is missing fo ntact has not been selected on this lin MT" is selected as the UOM, the line (r this item. Please update this line e item. If there is not an available Qty will be reset to 1. This may ch	e item with the dealer contact, please share nange the total price fo	or supplier who will fullfill this order. this order with the supplier by communicating to them outside of OhioBuys or the line item, please verify the item price before you submit the requisition.
Describe the item				Select Supplier
ID 6477				Supplier INGENESIS INC
Name*	IT STAFF AUGMENTATION SERVI	Item Code		Order Supplier ①
Ordered Qty ()*	AMT Or			Supplier Contact
Commodity		Profile ID	C Find Area	Supplier Location ①
MBE Set Aside	ary personnel services	•	Fixed Asset	
N	© -			Use Non-Default Supplier Location
Product				Dealers Available
Delivery Date*				Controlling Board Number ①
CSP900917-1				
Continuation?				

- 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.

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**.





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

 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.

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.

	Analytics	Public Request	Admin	Config	A	Ų.	8 м	lichael K.	•	٢
)		Q	Search				F	۱.	€ 🖶	?
					С	onversa	tions			•
					1					
			C		on					
			R	eceiving R	eq					
				No						
						No	conver	sations	s yet	
						<u>Start a</u> Discus	new inte s with men	rnal conve nbers of yo	ersation our team	

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 <u>OBM.ContactCenter@obm.ohio.gov</u>.

OhioBuys Completing Chartfield Information

Updated: 03/26/2025 07:27 PM

Version: 6.0

• 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



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	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 **Penci**l icon.

A	Add a li	ne		Edit Line	25		
		#	\$	Ref. \$	Item description \$	Ordered Quantity \$	Unit \$
1	A	451	4-1		Mediation Services	1.00	AMT



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.





Creating and Managing Purchase Requisitions in OhioBuys Completing Chartfield Information

Duplicate 🌲		ID ≑	Fund Code	Account	ALI		
<u>ال</u>	1	12947	grf - GENERAL REVENUE	510052 - Legal Services avail for bid	005406 - LAW- RELATED EDUCATION		
۵.	Û	12932	See All	515504 - 🛛 S - 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

+ Allocation

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.

1 P				B	Save	Save & Close Close	Save & New	Apply Ord	er Supplieo'Contact To A	il Line Iter	115				
10 C	 Budget In 	nfor	nation												DP52 PATR
50 R 47 R	+ Allocatio	in	To be allo	0.000 USD											
8 4	Duplicate of		ID 0	Fund Code		Account	1		Department		Program	Grant/Project	Project	Servic	
		8	12947	GRF - GENERAL REVENUE	۰.	510052 - Legal O - Services avail for bid	2	0.	DPS200000 - OHIC STATE HIGHWAY PATROL	•••	4455E - O - UAW				
		8	12932	GRF - GENERAL REVENUE	۰.	515504 - O - TEMPORARY SERVICES-LEGAL	legal	0		•					plier
	2 Record(s)						005502 - CO 005607 - CO	MMLEGAL EDUC	ATION OPPORTUNITY JING LEGAL EDUCTN						EEN L/
	 Contra 	ict F	unding					See All						_	
														_	
		E							_						

🔺 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.

Department	
	•



Adding Non-Favorite Departments

Department	Program
1 •	4455E - LAW
DPS200000 - OHIO STATE HI	GHWAY PATROL
See All]
	GENERAL

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

te of Ohio: Departme	nt				
			Close		
Keywords			Favorite Departments		
	Q, Search	Reset	Kaizer-Requester Michael	× 0-	
Contract					
	•				
Filters Favorite Departments	: Kaizer-Requeste	er Michael 🗙			
Label					
DPS200000 - OHIO STA	TE HIGHWAY PATI	ROL			

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** (

Keywords			Favorite Departments
DPS2	Q Search	Reset	· · · ·
Contract			
•			
Filters Keywords: DPS2 X			
Label			
DPS200000 - OHIO STATE	HIGHWAY PATR	OL	
Label DPS200000 - OHIO STATE	HIGHWAY PATR(DL	

Creating and Managing Purchase Requisitions in OhioBuys Completing Chartfield Information

Split Allocations

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

				In al. The Amount
ISTV Xref	Site 🛈		Budget Reference	(USD)
•	DPS100000 Directors Office CDSB	0 -		750.000
•	DPS100000 Directors Office CDSB	O -	•	0.000
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63 R												7	Ŀ
e et		Program		Grant/Project	Project	Service Location	Report	Agency Use	ISTV Xref	Site ①	Badget Reference	Ľ /	Ŀ
000 - CI	410 0 -	4453E - LAW	0.		•					DPS100000 Directors Office CDSB	•	750.000	Ŀ
500 - ELS OFF	o -	13781 - LEGISLATIVE INSPECTOR GENERAL	0.	•	•	•	•	•	•	DPS100000 Directors Office CDSB	•	0.000	pler
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🔺 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 (i)	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 \Rightarrow	Remaining Quantity to be Allocated $\protect{Philosophi}$
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.





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 requestion users should click Cancel in this pop-up.
- Users should only click **OK** if they intend to <u>erase all previously entered chartfield information across all line items on the purchase requisition</u>.

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.



Updated: 03/26/2025 07:30 PM

Version: 6.0

• 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		This OhioBuys	Suppliers Sourcing Contracts Shop Procurement Approvals Analytics Public Request Admin Config Integration Settings	Invoicing Release & Permit	🔆 🕒 Simon O, 👻 🔞
avigate to the Business Unit field.		< つ ☆	Requisition: REQ0000004858 - Req. 1/18/2024 (Draft)	Q, Search	T B A B O
Organization ①* DAS101000 Administrative Support Divisn JRST40	0.	45 1 Parchase Requisition 1 Term 1 Controlling Board 2 Workflow 1 States & Permit 2 Requisite Program 2 Requisite Program 2 Relasse & Permit 2 Records Report Regulation 2 Relasse & Permit	Box Box Box Box Constitution Consteanomemon Constitution Constitution Constitution C	Rest Allection Creati Solication 0 - 1	E Other Actions + Flocal Year Budget Date* 1/18/2024
Business Unit*					
DAS01 - Dept of Admin Services	0-				
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Selecting PAY01-Payroll

2. Select PAY01-Payroll from the drop-down menu.		Thig ObloBuys	Suppliers Sourcing Contracts Shop Procurement Approvals Avalytics Public Request Admin Config Integration Settings	Invoicing Release & Permit	🕂 🕒 Simon O. 🔹 🔞
		く つ ☆	Requisition: REQ0000004858 - Req. 1/18/2024 (Draft)	Q, Search	H B A B (7)
Business Unit*		Purchase Requisition Term Controlling Board More for the second secon	ii Save Submit for Approval << Back to Catalog	Reset Allocations Create Solicitation	E Other Actions •
DAS01 - Dept of Admin Services	0 -	S Requisite Program	Diversity of the support Divisn JRST40 Business Unit*	0 -	Budget Date*
CSA01 - DAS Central Service Agency OAK01 - OAKS		 ✓ Release & Permit Electronic Signature 	DASDI - Dept of Admin Services CSA01 - DAS Central Service Agency OAK01 - DAKS PAYD01 - Payroll P07701 - Rep Indus	0-	曲 1/18/2024
PAY01 - Payroll PRT01 - State Printing		[Page][Missing texts][Update tex [Site map][Legal mentions]	HTML* Solid Thing H3[Admin settings][Pige settings][HLP][D][\$] +0.36-1.00M8[Ajax : 4 / 2473a][V	[[E]]No configuration context audit][Check acces	sibility) Ohio v3.0 © Training - New

Save Updates

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



Т



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.

I.	•
#1 RADON TESTER	
0000008269 171 HALL RD 6011	8 ALIQUIPPA
1 800 CONFERENC	E
0000135241 VENDOR OBSOLET	E USE 0000195790 99999 OBS
	Con All

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

STATE	0 -

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 <u>OBM.ContactCenter@obm.ohio.gov</u>.

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

Delivery Date*
iii 3/22/2023
Product Code
Continuation Comment
Continuation Order
Continuation Order
•
Continuation?
• Yes
⊖ No

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



Updated: 03/27/2025 03:16 PM

Version: 9.0

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

 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 Requisit	ions	
Create Req	uisition	
Requisite Progra	am	
Browse Orders		
Pending Receipt	S	
Browse Receipts	S	
Create Reco	eipt	
Browse Request	To Purchase	
Create Req	uest To Purcha	ase



Review the Purchase Requisition

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

_	< 2 Requisition: REQ0000004592 -	Masking	Tape Requisition (Requisitioner Approval)	Q, Search 🛛 🐂 🗧			
»	Save Forward Reject	Submit for	Approval << Back to Catalog Reset Allocati	ons Create Solicitation E Other Actions +			
8	Header						
*	Requisition ID			Ship to			
× .	4592		Commercial Printing Requisition @	Shin to "			
Ø	Status			P002119 Das asD BSC 27.5 HIGH ST FL 16 77.5 High Street Breen:			
6	Requisitioner Approval			16th floor Columbus			
#	Type*		Receiving Required?*	DAS AKO BASC 775 5 HGAI 5T FL 1.6 77 5 Haji Simer, Room 1675 140h Roo Ba A Commission Tech Support 4215-6345 Columbus ON6 UNITED STATES			
	Standard Purchase	0 -	No ••				
	Requisition Label *						
	Masking Tape Requisition						
	Requester*						
	Training DASRequester01	0 -		Attn			
	Organization ()*		Fiscal Year				
	DAS103000 Office of Collective Bargning DASBRD	0 -	2023 - State of Ohio	Request Description			
	Business Unit*		Budget Date*				
	DAS01 - Dept of Admin Services	۰ 0	⊟4/28/2023				
				Commonto do Comilias			
Site ma	ap([Legal mentions]			ONo v2.0 © Training			

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.

Requisition ID			
4592		Commercial Printing Requisit	tion (i)
Status			
Requisitioner Approval			
Type*		Receiving Required?*	
Standard Purchase	0 -	No	© -
Requisition Label *			
Masking Tape Requisition			
Requester*			
Training DASRequester01	0 -		
		Fiscal Year	
Organization ()*		2023 - State of Ohio	
Organization ()* DAS103000 Office of Collective Bargning DASBRD	0 -		
Organization ①* DAS103000 Office of Collective Bargning DASBRD Business Unit*	0.	Budget Date*	

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

Type *	
Standard Purchase	© -
Pcard Purchase	

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.

 Additional Agency 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

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 Engumber	Put PR On Hold?
Sole Source	Sudden and accidental direct physical of	lamage to property? ①
Request DAS to Source		

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

 Attachme 	nts - I	Internal, Supplier, and Justification (i)				
Add Attachme	ent					
Keywords		Q. Search Reset				
➡ 0 Sele	ected					
		Title	¢	Att.	Contact	\$
Û	San	Rendering of Design		a	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.



Line Item Information

Describe the item				
ID				
6546				
Name*		Item Code		
Masking Tape, Utility, 2", 24 rolls per case	2			
Ordered Qty*				
1.00 Case	O -			
Commodity*		Profile ID		
31201503 - Masking tape	Θ-		-	Fixed Asse
Products types*		MBE Set Aside		
Yes	Θ-	N	Θ-	
Delivery Date*				
iii 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.

upplier		
CINCINNATI ASSOCIATION FOR THE BLIND	Θ-	Ø
Order Supplier ④		
CINCINNATI ASSOCIATION FOR THE BLIND	0 -	ø
upplier Contact		
	•	
upplier Location (1)		
Use Non-Default Supplier Location Dealers Available		
ontrolling Board Number ④		
	•	

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

Speed Chart can be applied ③

More Item Information

> Release & Permit

> Budget 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.



🔺 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

 More Item Information 	
Product -	Contract Contract Type
Masking Tape, Utility, 3", 16 rolls per case	Comments to Supplier
Masking Tape, Utility, 4", 12 rolls per case	
Masking Tape, Utility, 1-1/2", 24 rolls per case	
Masking Tape, Utility, 2", 24 rolls per case	Internal Comments
Masking Tape, Premium, 2", 24 rolls per case	
See All	Attachments
	O Click or Drag to add files

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

									ж (00
					Close					
				Q Search	Reset					
MBDD Status			0	ganization						
			•		-					
Market Type										
			-							
Tag										
Mandatory- DAS Contract × Man	datory- First Requis	ite Programs 🛛 🕹	O -							
Mandatory- Second Requisite Program	ns × MBE Set-a	side ×								
		BLIND × Tag: M	andatory- D	AS Contract	X Mandatory- First Requisite Programs	Mandatory- Se	cond Requisite Prop	rams 🗙 MBE Se	t-aside × Status : Ar	nnrove
Filters Supplier : CINCINNATI ASSOC	CIATION FOR THE I									
Filters Supplier: CINCINNATI ASSO	CIATION FOR THE .									
Filters Supplier: CINCINNATI ASSO	CIATION FOR THE									
Filters Supplier: CINCINNATI ASSOU	CIATION FOR THE	Product Code ① 🕸	Name \$	Image	Product Summary	Supplier \$	Manufacturer \$	Price \$	Validity Start Date \$	Valio
Filters Supplier: CINCINNATI ASSOL	CIATION FOR THE	Product Code ① 💠	Name \$	Image	Product Summary Masking Tape, Utility, 3°, 16 rolls per case	Supplier \$	Manufacturer \$	Price \$	Validity Start Date \$	Valie
Filters Supplier: CINCINNATI ASSO Quantity	CIATION FOR THE	Product Code ① 🔅	Name \$	Image	Product Summary Masking Tape, Utility, 3", 16 rolls per case (3-49-6707) General-purpose masking tape	Supplier \$	Manufacturer \$	Price \$	Validity Start Date 💠	Valie
Filters Supplier: CINCINNATI ASSO	Commodity \$	Product Code ① 🖨	Name \$	Image	Product Summary Masking Tape, Utility, 3°, 16 rolls per case (3-49-6707) General-purpose masking tape protectscontoured or rounded surfaces	Supplier \$	Manufacturer \$	Price \$	Validity Start Date \$	Valid

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.)

1 3 - Add to Cart Masking tape CRP30004-3-49- 6710	Masking Tape, Utility, 2", 24 rolls per case	Masking Tape, Utility, 2", 24 rolls per case (3-49-6710) General-purpose masking tape protectscontoured or rounded surfaces from being marred by paint, varnish, or other finishingmaterials. Crepe paper backing adds strength, which is invaluable during tape removal. Resistant to moisture and solvents.
---	---	---

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

 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)

 Begins
 Seeking
 Date of a line
 Date line
 Date line

Press the Enter key to continue.

+ Allocatio	n							
Duplicate c		ю о	Fund Code	Account	AU	Department	Program	Grant/Projo
							10018-0440 0-	
	8	33174	1010 - INMATE Q -	SO1000 - WORK O -	MINICEMENT		ADMIN FOCK	

Save Line Item Information

6. Click Save & Close.

Save & Close

»			a Save & Close	C Reset Allocat	tions Save & New	Apply Order S	upplier/Contact To All Line Items					
		_		6								
*	> Release	& Permit										
8	> More Ite	m Informatio	n									
9	 Budget I 	nformation										
*	+ Allocati	on										
	Duplicate	D ID 0	Fund Code	Account	ALI	Department	Program	Grant/Project	Project	5		
		13174	1010 - INMATE O - LEGALASSISTANCE	S01000 · WORK 0 ·	001698 - CASH MANAGEMENT IMPROVIMINT FIND] 🗔	10018 - OHIO ADMIN KNOWLEDGE SYSTEM	-	•	ł		
	1 Record(s)	1 Record(s)										
	~ Contr	act Funding								1		
	_					_						
						_				f		

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:

- <u>Term tab</u>: 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
- <u>Controlling Board tab</u>: 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
- <u>Workflow tab</u>: 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
- <u>Release & Permit tab</u>: View release and permit information associated with the purchase requisition
- <u>Electronic Signature tab</u>: 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**.

Submit for Approval



- 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.


Updated: 03/27/2025 03:34 PM

Version: 8.0

• 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.

pending val	idatio	ns			See 1 res
Workflow	\$	Activity	\$ Object	Due date \$	History
Standard Requi	sition	Requester	REQ0000004525 - DPS - Ingenesis Q4 FY23 (DPS732000 Fiscal Section 3 CDSB - WEHNER RONALD)		

	Welcome!	-	\bigcirc	
Pied Help Getting Started'	The selected content contains no lest	Current FY P	7's Requisitions	
		0	•	
		My Sourcin Projects	8 Pending Receipts	
	My pending validations See 1 res	•		
	Workflow 0 Date date History Standard Requisition Requester BED0000000525-DP5-Internetic 04.FY23/DP5722000 History	My Open On	lers	
	Workflow Supervisor Final Section 3 COSE - WEINER BOOMLOP			
	My Shanning Lists Go to po			 Oliv 20 C Trible 1

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	Commercial Printing Requisition ①
Status	
Supervisor	
Туре	Receiving Required?
Standard Purchase	No
Requisition Label	
DPS - Ingenesis Q4 FY23	
Requester	
WEHNER RONALD	
Organization ①	Fiscal Year
DPS732000 Fiscal Section 3 CDSB	2023 - State of Ohio
Business Unit	Budget Date
DPS01 - Dept of Public Safety	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	Bill To
DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RO SUITE X 44141 BRECKSVILLE Ohio UNITED STATES	DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RO SUITE X 44141 BRECKSVILLE Ohio UNITED STATES
Attn	
DPS Requester	
Request Description	
0	
Payment for Ingenesis Non-IT Staff Aug for Q4 of FY23	
	h
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 			
Single Source	Do Not Encumber	Put PR On Hold?	
Sole Source	Sudden and accidental direct	physical damage to property? ①	
Request DAS to Source			

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

 Attachments - Internal, Supplier, and Justification(i) 						
➡ 0 Selected						
Title	⇔ Att.	Contact	\$			
Quote - ING20230412	a	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.

lte	ms	& S	ervice	s													
	Ad	id a l	ine		Edit Lin	es											
				0	Ref. 😄	Item description	Ordered Quantity o	Unit o	Price 0	Total	Deliv. date o	Blank	ket PO ID 🔅	Blanket PO Line Number 🔅	OAKS ID 🔅	Supplier	0
	1	4	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 IN	с
	1 R	ecord	1(5)														

To review information related to the item, click the **Pencil** (*P*) 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.

Describe the item		Select Supplier	
D		Supplier	
6435		INGENESIS INC	G
Name	Item Code	Order Supplier ④	
HOURLY STAFFING FEE FOR NON-IT STAFF AUGM	30194	INGENESIS INC	G
Ordered Qty (1)		Supplier Contact	
1.00 AMT		Ingenesis Greg	
Commodity	Profile ID	Supplier Location (i)	
80111600 - Temporary personnel services		СНК	
MBE Set Aside			
Ν		Use Non-Defau	It Supplier Location
Туре			
Product		Dealers Availab	le
Delivery Date		Controlling Board Numbe	r (i)
5/12/2023			
Product Code			
CSP900917-2			
Continuation?			
O Yes			
○ No			

Approve

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

Chose Fernand Najor	Approve Approve Cother Actions - Other Actions -	
Caution: There are line items which have one or more Non-Blocking alerts. Please review these	a shart hadan considering the conclusion and differ	
	card borne comprising the percent requirement	
Header		
Perpublicen ID 2	Commercial Printing Requilition @	
🖉 Status		
e Supervisor		
Type	Receiving Required?	
SERVER AND ADDRESS	ND	
Requisition Label		
UPD-TRETESS Q4PT20		
WEINER RONALD		
Organization (I)	Final War	
DPS732000 Fiscal Section 3 CD58	2023 - State of Ohio	
Business Unit	Budget Date	
DPS01 - Dept of Public Safety	4/12/2023	
	C 1 1 1 1	
Ste map(legal mentions)	OD IN 1989	Ohio v3.0 © 🏠

🔺 Note

Dojoct

Approve

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.

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 <u>OBM.ContactCenter@obm.ohio.gov</u>.



Additional Agency Approver - Approving a Purchase

Requisition

Updated: 03/27/2025 03:33 PM

Version: 4.0

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

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	s window	See Chicateurs < D ☆	Suplins Surchy Certacts Day Proventent Rebard Prest Aubrics PublicReport Admin Regulationer	C. Seach	
on the nonepage, click on the Object hyperlink.		? Need Help Getting Started?	Vinist Addition	Current FY/POIs	
My pending validations	See 1 result		My pending validations		
Workflow	e 💠 History		Worksom Carteries Opport Opp	My Sourcing Property 1 Release & Porrnit	

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	Commercial Printing Requisition ①
Status	
Supervisor	
Туре	Receiving Required?
Standard Purchase	No
Requisition Label	
DPS - Ingenesis Q4 FY23	
Requester	
WEHNER RONALD	
Organization (1)	Fiscal Year
DPS732000 Fiscal Section 3 CDSB	2023 - State of Ohio
Business Unit	Budget Date
DPS01 - Dept of Public Safety	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	Bill To
DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE ONIO UNITED STATES	DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE Ohio UNITED STATES
Attn	
DPS Requester	
Request Description	
0	
Payment for Ingenesis Non-IT Staff Aug for Q4 of FY23	4
Comments to Supplier	
Negotiated quote is attached	h

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 		
Single Source	Do Not Encumber	Put PR On Hold?
Sole Source	Sudden and accidental direct physical of	lamage to property? ①
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	p	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.

Ite	ms &	Se	rvices													
	٨٨٨	a lie		Edia	Line											
	7000		ie -	EUIC	Line	5										
		1	r 0	Ref.	0	Item description 0	Ordered Quantity $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	Unit o	Price 0	Total	Deliv. date 🔅	Blanket PO ID 🔅	Blanket PO Line Number 🔅	OAKS ID 0	Supplier	0
	/		4525-1	8000	0	HOURLY STAFFING FEE FOR NON-IT STAF	1.00	AMT	1,500.000	1,500.00	5/12/2023			0000229814	(INGENESIS INC) INGENESIS II	٩C
	1 Rec	ord(s	5)													

To review information related to the item, click the **Pencil** (\mathscr{P}) 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.

em			
		Save Save & Close	Close
Describe the item		Select Supplier	
ID		Supplier	
6435		INGENESIS INC	S
Name	Item Code	Order Supplier ①	
HOURLY STAFFING FEE FOR NON-IT STAFF AUGM	30194	INGENESIS INC	S
Ordered Qty ③		Supplier Contact	
1.00 AMT		Ingenesis Greg	
Commodity	Profile ID	Supplier Location ③	
80111600 - Temporary personnel services		СНК	
MBE Set Aside			
Ν		Use Non-Default	t Supplier Location
Туре			
Product		Dealers Available	2
Delivery Date		Controlling Board Number	()
5/12/2023			
Product Code			
CSP900917-2			
Continuation?			
⊖ Yes			
O No			

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.

Reason :		
		la
	Cancel	Confirm

🔺 Note

If you are approving a Pcard purchase it will automatically be processed into a purchase order once you <u>and</u> 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 <u>OBM.ContactCenter@obm.ohio.gov</u>.



Agency Procurement Approver - Approving a Purchase Requisition

Updated: 03/27/2025 03:28 PM

Version: 7.0

Purpose & Profiles

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

┛ 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.

y pending va	lidatio	ons				See 17 result
Workflow	\$	Activity	٥	Object	Due date \$	History
Standard Requisition Workflow		Agency Procurement		REQ0000004525 - DPS - Ingenesis Q4 FY23 (DPS732000 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 ①
Status	
Procurement Approval	
Туре	Receiving Required?*
Standard Purchase	No 🖸 -
Requisition Label*	
DPS - Ingenesis Q4 FY23	
Requester	
WEHNER RONALD	
Organization ()*	Fiscal Year
DPS732000 Fiscal Section 3 CDSB	🖸 🗸 2023 - State of Ohio
Business Unit*	Budget Date*
DPS01 - Dept of Public Safety	3 - iii 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 * Proceeding Dis InvESTIGATIVE UNIT 6450 W SNOWVILLE RD SUITE X O * PRECISIVULE DPS INVESTIGATIVE UNIT Gestow SNOWVILLE RD SUITE X 44141 BRECISIVLLE ONIG UNITED STATES	PODS432 DP5 INVESTIGATIVE UNIT 6450 W SNOWVILLE RD SUITE X O + BRECKSVILLE
Attn	
DPS Requester	
Request Description © Psymmet 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. As the Agency Procurement Approver you are responsible for selecting any **Purchasing Options** that should be applied to the purchase requisition:

- 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 p	hysical damage to property? ①	
Request DAS to Source			

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

Items & Servie	ces							
Add a line	Delete	Lines	Copy Selected Lines	Edit Lines				
➡ 1 S	elected	Set Alloo	Cations Quick Quote					
•	# \$	Ref. \$	Item description	¢	Ordered Quantity A	Unit \$	Supplier	\$
•	4525-1	8000	HOURLY STAFFING FEE F	1.00	AMT	(INGENESIS INC) IN	GENESIS 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** (*Pencil* (*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.

			Select Supplier	
P			Supplier	
6435			INGENESIS INC	G
Name*		Item Code	Order Supplier ①	
HOURLY STAFFING	FEE FOR NON-IT STAFF AUGME	30194	INGENESIS INC Or	S
Ordered Qty 🕕			Supplier Contact	
1.00	AMT 🖸 🗸		Ingenesis Greg 🛛 📿 🗸	
Commodity		Profile ID	Supplier Location ①	
80111600 - Tempora	ry personnel services		• CHK	
MBE Set Aside				
Ν	0	•	Use Non-Default Supplier Location	
Туре				
Product			Dealers Available	
Delivery Date*			Controlling Board Number ①	
m 5/12/2023			· · ·	
Product Code				
CSP900917-2				
Continuation?				
⊖ Yes				
O N				
O NO				
U №	Order Supplier INGENESIS INGENESIS II 00002298140 100 NE 100	• INC NC -3 P410 STE 806 782	216 SAN ANTONIO	
U №	Order Supplier INGENESIS INGENESIS II 0000229814 100 NE LOO	• INC NC -3 P 410 STE 806 782	216 SAN ANTONIO	
() №	Order Supplier INGENESIS INGENESIS II 0000229814 100 NE LOO INGENESIS II	• INC •3 P 410 STE 806 782 NC	216 SAN ANTONIO	
() No	Order Supplier INGENESIS INGENESIS II 0000229814 100 NE LOO INGENESIS II 0000229814 10231 KOTZ	• • • • • • • • • • • • • • • • • • •	216 SAN ANTONIO	

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

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.

bequisition: REQ0000004525 - DPS - Ingenesis Q4 FY	23 (Procurement Approval)	ee			
a Seve Close	Save & Close Tonward Reject Approve	tog Reset Allocations Other Actions -			
A - Caution There are line items which have one or more New Hard	bing alorts. Please review these alorts before consulation this surpluse recui-				
-		7			
Header		4			
Requisition ID		ip to			
4525	Commercial Printing Republicion @	Shin to'			
Status .		P005432 DP5 INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 0 -			
Procurement Approval		MECKANTE 4			
Type	Receiving Required**	DPS INVESTIGATIVE UNIT			
Standard Purchase	No 0 -	44541 BRCKSVLLE			
Requisition Label*		One UNITO STATES			
DPS - Ingenesis Q4 PY28		UNIEDSIAIES			
Requestor		Aza			
WDHNER RDNALD		DPS Requester			
Organization (2)*	Fiscal Nor				
DP9732000 Fiscal Section 3 CD58	O - 2023 - Sune of Ohio	Request Description			
Business Unit?	Budget Date '				
DPS01 - Dept of Public Safety	O - ⊟4/12/2023	Comment for increases him 17 First days for Col at 1973			
		Paperson for improvementation and and the paper of the			
		Community in Examples			
		Comments to appren			

🔺 Note

Approve

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 <u>OBM.ContactCenter@obm.ohio.gov</u>.



Updated: 03/27/2025 03:31 PM

Version: 8.0

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



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 (1)
Status	
Fiscal Approval	
Туре	Receiving Required?
Standard Purchase	No
Requisition Label	
DPS - Ingenesis Q4 FY23	
Requester	
WEHNER RONALD	
Organization (i)	Fiscal Year
DPS732000 Fiscal Section 3 CDSB	2023 - State of Ohio
Business Unit	Budget Date*
DPS01 - Dept of Public Safety	m 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 PO05422 DPS INVESTIGATIVE UNIT 6450 W SNOWVILLE RD SUITE X BRECKSVILLE	P005432 DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X
DPS PWYSTICATIVE UNIT 6509 V SIOWULE RD SUITE X 4444 BRECISYULLE 00i0 UNITED STATES	
Attn	
DPS Requester	
Request Description	
0	
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.

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

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 (j)	\$ Percentage	Incl. Tax Amount ()	Department	4
	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 Lin	ies					
➡ 0 Selected	Set Allocations Quick Quote					
□ # ≑ F	tef. tem description	Ordered Quantity \$	Unit	Supplier \$	Total	Deliv. date 👙
🗌 🖉 🛕 4525-1 8	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** (*Image 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.

Supplier			
INGEN	ESIS INC		Ø
Order Su	oplier (i)		
INGEN	ESIS INC		ø
Supplier (Contact		
Ingene	sis Greg	e	Э-
Supplier L	ocation (i)		
СНК			
0	Use Non-Default S	Supplier Loc	atio
0	Dealers Available		
Controllir	g Board Number 🤅	D	

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 <u>Applying Speed Charts</u> Job Aid.

		<u>^</u>
1,500.0000	USD	(1)
Total Amount		
1,500.000		
Supplier Quote ID 🕄		
ING123		
	Freed Chart?	
Do you want to apply a	a speed Chart:	
Do you want to apply a	a speed Chart:	
Do you want to apply a	i speeu Chart:	
Do you want to apply a	speed Chart:	

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

Budget Information

		To be alloc	ated							
+ Allocation	n		0.000	USD						
Duplicate 🌲		ID \$	Fund Code	9		Account		ALI		Department
(i)	Û	12982	GRF - C REVEN	ENERAL UE	0 -	501000 - WORK PERFORMED	0 -	005406 - LAW- RELATED	Θ-	DPS210400 - SEG 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.



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 the approval workflow.

Beguidding PE0000004525 - DPE - In	annetic Od EV22 (Sircal Anneuval)	0, Seath						
Requiring Requiring 5 - 57 5 - 10	general (et l'12) (i near Approval)	80*						
	e Close Save & Close Forward Reject Approve	Moset Allocations Other Actions +						
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- Header								
P International		o to						
4525	Commercial Printing Requisition @							
CP 202.5	0	Ship to						
Fiscal Approval		PROSECT DPS INVESTIGATIVE UNIT 6600 W SNOWVILLE RD SUITE X BRECKSVILLE						
Type	Receiving Required!	DPS INVESTIGATIVE UNIT						
Standard Purchase	No	6650 W SNOWVILLE RD SUITE X 44341 BRECKSVILLE						
Requisition Label		Ohio						
DPS - Ingenesis Q4 FY22		UNITED STATES						
Requestor		Am						
WEHNER RONALD		DPS Requestor						
Organization ()	Fiscal Year							
DP5722000 Fiscal Section 3 CD58	2023 - State of Ohio	Request Description						
Business Unit	Budget Outo"	0						
DFS01 - Dept of Public Safety	04/12/2023	W Promote for Internation Network State for Call of DV23						
		regeners to appendix reaction and reaging to the other						
		Comments to Supplier						
When work the and work and		641-10 6 1 00						
ann undelandin und no ve								

Approve

🔺 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.

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 <u>OBM.ContactCenter@obm.ohio.gov</u>.



Updated: 03/27/2025 03:27 PM

Version: 8.0

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



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	Commercial Printing Requisition @
Status	
Final Approval	
Туре	Receiving Required?
Standard Purchase	No
Requisition Label	
DPS - Ingenesis Q4 FY23	
Requester	
WEHNER RONALD	
Organization ①	Fiscal Year
DPS732000 Fiscal Section 3 CDSB	2023 - State of Ohio
Business Unit	Budget Date
DPS01 - Dept of Public Safety	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	Bill To
DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE ORIo UNITED STATES	DPS INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X 44141 BRECKSVILLE Ohio UNITED STATES
Attn	
DPS Requester	
Request Description	
0	
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 the **Items** box to view the line item(s) associated with the purchase requisition. Click the **Pencil** (*Pencil* (*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 (i)				
> Chart of Account Values				
Items & Services				
Edit Lines				
# \$ Ref. \$ Item description \$	Ordered Quantity \$	Unit \Leftrightarrow Price \Leftrightarrow	Total	Deliv. date \Leftrightarrow Blanket PO ID \Leftrightarrow
	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

	CI	Save & New Apply Or	der Supplier/C
Describe the item		Select Supplier	
ID		Supplier	
6435		INGENESIS INC	G
Name	Item Code	Order Supplier (1)	
HOURLY STAFFING FEE FOR NON-IT STAFF AUGM	30194	INGENESIS INC	G
Ordered Qty (i)		Supplier Contact	
1.00 AMT		Ingenesis Greg	
Commodity	Profile ID	Supplier Location (1)	
80111600 - Temporary personnel services		СНК	
MBE Set Aside			
N		Use Non-Default S	upplier Locatio
			upplier Locatio
Туре			
Type Product		Dealers Available	
Type Product Delivery Date		Dealers Available Controlling Board Number ①)
Type Product Delivery Date 5/12/2023		Controlling Board Number ()
Type Product Delivery Date 5/12/2023 Product Code		Controlling Board Number ()
Type Product Delivery Date 5/12/2023 Product Code CSP900917-2		Controlling Board Number C)
Type Product Delivery Date 5/12/2023 Product Code CSP900917-2 Continuation?		Controlling Board Number C) •

Approve

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

Requisition: REQUUUUU4525 - DP5 - Ingenesis Q4 FT23 (Fir	al Approval)	8 S X
S Close	Forward Reject Approvepplag = Other Actions -	
Cautian There are line items which have one or more Non-Blocking alert	. Please swiew these alerts before completing	
Header		
Requisition ID		
4525	Commercial Printing Requisition @	
Ø Status		
El Final Approval		
Тура	Receiving Required?	
Standard Purchase	No	
Requisition Label		
DPS - Ingenesis Q4 FY23		
Requester		
WEHNER RONALD		
Organization (I)	Fiscal Year	
DPS732000 Fiscal Section 3 CD58	2023 - State of Ohio	
Basiness Unit	Budget Date	
DPS01 - Dept of Public Safety	4/12/2023	
and the second se		

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.

Approve

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 <u>OBM.ContactCenter@obm.ohio.gov</u>.



Updated: 03/27/2025 03:55 PM

Version: 4.0

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

Creating and Managing Purchase Requisitions in OhioBuys Reviewing Sourcing Details for a Purchase Requisition

Sourcing Link on Line Item

Sourcing

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.

MWK Mediation Services 12.13

< *	③ ☆ Requisition: RI	EQ0000004827 - MWK Mediati	on Services 12.13 (Requis	itioner Approval)	Q, Search		`₩ ⊕
»	El Save	Forward Reject Approv	<< Back to Catalog	Reset Allocations	= Other Act	tions +	
						(1)	
Ð							
ISID 0	Supplier	Order Supplier Address Line 1	Order Supplier City Name	s © Contract Type ©	Contract Sub-Type ©	Sourcing	
Ø ⁰¹⁶⁴⁵⁰³	(ASSETWORKS LLC) ASSETWORKS	LLC 998 OLD EAGLE SCHOOL RD STE 121	5 WAYNE			MWK Mediation Servi	pes 12.13
8							٥
						Amount : 75	.00 USD

Analyze and Award

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





Scenarios



Proposals Awarded



Review Responses

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

		Ε.	2C000000	1312	- MW	K Mediation Ser	vices 12.	13 - Analyz	te & A	ward	Q, Sea	rch			F	₽
«		2														
tup Team																
uiry	✓ Re	sponse														
d Suppliers							ASSETW	ORKS LLC Pro	posal # 1	(USD)		CAREW	ORKS TECHNO	DLOGIES	Proposa	
pare Solicitation		Code	Label		Qty _	Award	Unit	Amount	014	5100	USD	Unit	Amount	Otv	Kare	usr
w Solicitation				Ť			price		40			price	Tanada	40		
alvze & Award		1	Mediation Services	1	L.	ASSETWORKS LLC	75.00	✓ 75.00	1	100.000	75.00	80.00	80.00			
view Award Results	Total										75.000					
	1 Re	cord(s)														
	ec ang Project ang Pean Ang Pe	et po Project Jao Taan Jary 15 Suppliers ang-Softwatten mg-Softwatten More & Award Total 1 for	er Project lor Transit any any Standardson by Brain American any Standardson by Brain American Brain American Code 1 Brain 1	er mont to han any Shantana any Shartana any Shartanaa Shartana Shartana Shartana Shartana Shartana Shartana Sha	er herd to "ban they "Stands" top Stands they schedulen top Stands top Stands top Stands top Stands top Stands Text Text Text 1 Medicides Text 1 Medicides 1 M	e Prest op Nan Ary Sharoka par Sakatana op Kanana Par Baarda Tanana Par Baarda 1 Madadaka 1	er hendt op hans wir: Stands par Galetalon op 6 & deard wer Aused Rouchs Teat Teat Teat Teat	e Protect do Fana sinov Strandisti para Solitation solitation Strandisti Str	er hendt log han dry Standt apr Skadetal of y Standt apr Skadetal of y Standt apr Skadetal Hendelike New Averal Beaks 1 Medicike 1 Medicike 1 Medicike 1 ASSTVORS LLC Pro- Asstructors SLC Pro- Pro- Asstructors SLC Pro- Asstructors Pro- Asstructor	• Point • Point • Or Not • Point • Or Not • Point • Point • Point • Point • Code • Point • Point • Point • Point	e Particular part Sector part Advection part Advection Par	4 7 60 host op hos	4 A 60 Francis (AV) Francisco (AV) 200 Services (AV) Code : Lifet : CV : Ansiet : Main Annonet : Code : Lifet : Code : Lifet : Code : Ansiet : Main Annonet : Code : Lifet : Code : Ansiet : Main Annonet : Code : Lifet : Code : Lifet : Code : Ansiet : Main Annonet : Code : Lifet : Code : Code : Lifet : Code : Lifet : Code : Code : Lifet : Code : Lifet : Code : Lifet : Code : Lifet : Code :	• Ordit • Ordit <t< td=""><td>• Point • Point • Or Statuto • Point • Point • Control • Point • Control • Point • Control • Point Advector • Control • Point Advector • Mathematic International Internation International Internation Inte</td><td>• Ordit • Ordit <t< td=""></t<></td></t<>	• Point • Point • Or Statuto • Point • Point • Control • Point • Control • Point • Control • Point Advector • Control • Point Advector • Mathematic International Internation International Internation Inte	• Ordit • Ordit <t< td=""></t<>

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.

	4				3		1	
	Invited Suppliers		Total Proposals Submitted Supplier(s) Who Haven't Logged					
→ 0	Selected T	🖺 Downl	oad selected p	roposals	Compare Qu	otes by Item		
	Suppliers \$	OAKS ID 👙	Proposal \$	<u>Status</u> 🚖	Documents	Proposal Progress	Submitted (UTC-5)	Agencies Debarred
	ROLKA LOUBE SALTZER ASSOCIATES	0000186431	<u>Proposal #</u> 1	Submitted		100%	12/13/2023 3:18:21 PM	
1	CAREWORKS TECHNOLOGIES	0000067707	Proposal # 1	Submitted		100%	12/13/2023 3:17:03 PM	
Ē	ASSETWORKS LLC	0000164503	Proposal #	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.

SD		Total p	Tota er currency ISD 78.750	4 7 0					
leywords		Sho	w unansw	ered items o	only Q Search	Reset			
Response		ed							
	0 Select								
Code \$	0 Select	Label 🌲	Qty \$	Unit 🗘	Unit price \$	Amount \$	Deliv. date 🌲	Deliv. date 🌲	Supplier Attachments 🌩

Award Justification Section

Ohio 0 Ą 6. To review the explanation for the award, return to the Analyze ≙ Adn and Award tab and navigate to the Award Justification section. ₽ 17 12.13 - Analyze & Award 'n 6 3 Round Lot : 1 - Round : 1 - MWK Mediation Services 12.13 (Under Evaluation) Θ-Scenarios Award Justification Proposals 3 4 Invited Suppliers Total Proposals Submi

Award Justification and Explanation

7. The Award Justification and Award Explanation fields are	II.	Thir OnioBuys	Septier Sourche Contracts Shop Procurement Rolesse & Pemit Analytics Public Recurst 🛆 🗘 🕒 Druppocursenet/approx. T.
displayed.		 K 10 Gr Setup Project Setup Team Inquiry Add Suppliers 	Sourcing project: SRC000001312 - MWK Mediation Services 12.13 - Analyze & Award Q. Sourch R. De Construction Services 12.13 (Boter Sourcing) D. De Construction
Proposals		Prepare Solicitation View Solicitation View Solicitation Activity Analyze & Award	Addroguniter & Reportible & Second Insurance and regarable biddle:
Award Justification* Award Explanation*		Review Award Results	
Lowest Responsible & Responsible 🖉 - Selected lowest responsive and responsible bidder.	<i>i</i> , s	He map[Leps] mentions]	Overside States Nov

🔺 Note

For more information on Quick Quotes, please refer to the <u>Creating and Awarding Quick Quotes</u> 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 <u>OBM.ContactCenter@obm.ohio.gov</u>.

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.

4	opproval history						
	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		000	
	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

Purpose & Profiles

This job aid covers forwarding a purchase requisition.

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

Used When

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

Forward a Purchase Requsition

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.

Please select the user who should validate*
•
Systems Epilogue
See All



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 <u>OBM.ContactCenter@obm.ohio.gov</u>.

OhioBuys Duplicating a Purchase

Updated: 03/27/2025 04:01 PM

Version: 7.0

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.

\equiv Other Actions -	
Duplicate	
Cancel requisition	
Export Items	
Import Items	



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.

< 9 12	Requisition: REQ0000004518 - Copy of N	lediation Services 4/5/2023 (Draft)	Q. Search		
~		Submit for Announal or Back to Catalon Country S	Citization Citize Actions		
i Purchase Requisition					
🗰 Term	are line items which have one or mo	e Non-Blocking alerts. Please review these alerts before completi	ng this purchase requisition.		
Controlling Board					
Workflow					
Requisite Program	Requisition ID		Ship to Ship to*		
M Delaure C Describ	4518	Commercial Printing Requisition @			
	Status		P005432 DP5 INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X		
 Bectronic Signature 	Draft		DAD CASVILLE		
	Type"	Receiving Required?"	6650 W SNOWVILLE RD SUITE X		
	Autoritation Parchase		44141 BRECKSVILLE Ohio		
	Copy of Mediation Services 4/5/20		UNTED STATES		
	Requester				
	Test Requisitioner AC				
	Organization ①*	Fiscal Year			
	DPS100000 Directors Office CDS8	- 2023 - State of Ohio	Request Description		
	Business Unit*	Budget Date*			
	DPS01 - Dept of Public Safety	- ≅4/10/2023	Maritation Services for DDS in May 2023		
Cites encoded and according of			ONe v20 C TRACK NO		

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.



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.

Creating and Managing Purchase Requisitions in OhioBuys Cancelling a Purchase

0

Open the Purchase Requisition

OhioBuys A 4 0 1. To cancel a purchase requisition, users must first locate and 9 ú open the original purchase requisition. Navigate to the • ? Need Help Getting Started? Browse Requisitions page from the Procurement drop-down menu. +150 19 My Sourcing Projects Release & Permit Procurement +150 **Browse Requisitions** Create Requisition Browse Quick Quotes Browse Orders Browse Stock Orders Browse Receipts Create Receipt Browse Allocation Templates

Create

Browse Request To Purchase

Create Request To Purchase

		Requisition # \$	Name \$	Organization \$	Requester \Leftrightarrow	Req. Amount (1)	PR Status	PR Creation Date \$	
ø	4	REQ000004514	Mediation Services 4/5/2023	DPS100000 Directors Office CDSB	Kaizer- Requester Michael	750.00 USD	Draft	4/6/2023	

Creating and Managing Purchase Requisitions in OhioBuys Cancelling a Purchase

Cancel the Purchase Requisition

		OhioBuys	Suppliers Sourcing Contracts Shop Procure	ment Release & Permit Analytics Public Request	🛕 🗘 😧 Requisitioner A.C.T. 🔹 🔘
2. Once the purchase requisition	details appear, click the	< D ☆	Requisition: REQ0000004514 - Mediation	Services 4/5/2023 (Draft)	Q. Search 🗑 🖨
Other Actions button.		i Purchase Requisition	a Sar	ve << Back to Catalog Create Solicitation	Coher Actions -
		Controlling Board	▲ - Caution: There are line items which have one or more	e Non-Blocking alerts. Please review these alerts before compl	eting this p
		Workflow	Header Breukitise ID		
		S Requisite Program	4514	Commercial Printing Requisition (1)	Ship to*
Salact the Cancel requisition from th	ha dran, dawn manu	E Bectronic Signature	Datt		P055432 DP5 INVESTIGATIVE UNIT 6650 W SNOWVILLE RD SUITE X BRECKSVILLE
Select the Cancer requisition from th	le drop- down menu.		Type* Standard Purchase	Receiving Required?* No O -	6630 W SNOWVILLE RD SUITE X 44444 BRICKSVILLE
= Other Actions			Requisition Label* Mediation Services 4/5/2023		ONIO UNITED STATES
			Requester Kalzer-Requester Michael		Attn
Durlingto			Organization @* DP5100000 Directors Office CD58	Fiscal Year 2023 - State of Ohio	
Duplicate			Business Unit*	Budget Date*	Request Description
			Dist - Dipt of Patie Sinty		Mediation Services for DPS in May 2023.
Cancel requisition		[Site map[[Legal mentions]			ONIO V2.0 & Training - New
Export Items					
Import Items					
import items					
Click UK to confirm.					
envus03.ivalua.app savs					
Confirm the cancellation of the requisit	tion?				

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 <u>OBM.ContactCenter@obm.ohio.gov</u>.

OK Cancel



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).

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

Electronic Signature

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

i	Purchase Requisition
曲	Term
.4	Controlling Board
硷	Orders
Ţ	IT Review
	Workflow
	Delivery
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Create Signature Transaction

2. Click Create a new Signature Transaction.

+ Create a new Signature Transaction



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



Click or Drag to add files

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Save & Close



Launch Signature Process

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

✤ Launch Signature Process


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 <u>OBM.ContactCenter@obm.ohio.gov</u>.



Updated: 03/27/2025 04:15 PM

Version: 8.0

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 (4) 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.

~	Pending validations	() 9+

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

J	Scheduled Tasks	0 9
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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.

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

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		Import Data						
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🔺 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.

Remaining Actions Assigned to User icon

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**

 Interfaction
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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	Conversatio	on filter		
	-	-	•	Q Search	Reset

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 requested action.

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Nations Republics Seconds good, thanks for getting back to me.	3/28/2023	Jidd a Message		

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).

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Sounds good, thanks for gittle	ig back to me.	3/28/2023	🛞 🏚 🗌 Markas done	

Ø Send icon

Attachment icon

@ icon @

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🔺 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.

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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

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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

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Archive icon

-

🔺 Note

The **More Actions** ($\frac{1}{2}$) 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.

😫 Add internal users

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:



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 <u>OBM.ContactCenter@obm.ohio.gov</u>.