How to Review and Update a Purchase Requisition

Step-by-Step Instructions for Reviewing and Updating a Purchase Requisition

1. ▲ You will receive an email notification when you have a purchase requisition to review, and it will also be visible on the Ohio Buys homepage as an open workflow task in your My Pending Validations box.

Log in to Ohio Buys. From the Main Menu Navigation Bar, click **Procurement** and then click **Browse Requisitions** from the drop-down menu.

▲ The My Pending Validations window on the Ohio Buys homepage shows your most recent tasks awaiting your review. If desired, you can click on the Object hyperlink for any task to quickly view and take action on it. Once you have found the task you would like to open, click the **Pencil** (✏️) icon next to it.

2. On the Browse Requisitions page, click on the **Pencil** (✏️) icon next to the purchase requisition you need to review and update.

3. Review the applicable parts of the purchase requisition and ensure the fields are properly filled out.

a) Scroll down to review the purchase requisition’s **Purchasing Options** and **Attachments**. You can expand any of these sections by clicking on the associated header:

- **Purchasing Options section**: Indicate if the purchase requisition requires a DAS Sourcing Event, if it is Single or Sole Source, if it should be put on hold, and if it should not be encumbered. Use the displayed radio buttons to make your selections. If a DAS Sourcing Event is required, click the **DAS to Source** button to complete the associated request form, which will then be routed to DAS.

- **Attachments section**: Add internal, Supplier, or justification attachments as necessary

- **Workflow Main Approvals section**: View where the purchase requisition is in the approval workflow process

- **Controlling Board Overview section**: View information on the purchase or threshold status of the purchase requisition

- **Organization Structure section**: View organization-related information regarding the purchase requisition
a) Scroll down to the Items box to view the line item(s) associated with the purchase requisition.

b) If a line item is not a freeform line item, ensure the information associated with the line item is accurate.
   - If the purchase requisition is not a Pcard purchase, determine if budget/chartfield information must be added. If this information is already present, ensure it is accurate.

c) If the line item(s) is a freeform line item, determine if it is truly necessary or if there are comparable goods or services available in Ohio Buys. If the freeform line item is truly necessary, ensure sufficient detail has been entered (e.g., has the Requester selected the correct commodity code). To check if a freeform line item has a comparable good or service in Ohio Buys, click on the Pencil (✏️) icon next to the associated freeform line item and complete the following steps:
   1) In the Describe the Item box, change the Ordered Quantity, Commodity, and Product Types fields as necessary.

2) Below the Describe the Item box, click on the More Item Information header to search for a comparable good or service in Ohio Buys and replace the current line item with the comparable good or service.
3) In the Product field, click the Selector ( ) icon and then click See All at the bottom of the drop-down menu to search for and select a comparable good or service (if applicable).

4) In the Browse Items pop-up box, enter your search terms to search for a comparable good or service and click Search (if applicable).

5) From the list of search results, scroll through the available results until you find your comparable good or service. Once you find the good or service you plan to replace the current freeform line item with, click the Checkbox icon next to it (if applicable).

   ▲ Once you click the Checkbox, the Describe the Item box updates based on the product information of the new line item.

6) Once you have validated the item you want, click Save & Close to finalize the selection of it. In the Items box, the line item information updates to the line item information you have chosen.

   ▲ Within the Budget Information box, ensure existing budget/chartfield information is accurate, or complete unpopulated fields as necessary (e.g., Fund, Account, Department, Program).

   a) Whether the line items on a purchase requisition are freeform or from an Ohio Buys catalog, click on the Pencil ( ) icon next to the line item in the Items box to view its detailed line item information.

   b) Below the Describe the Item section for the line item, click on the Release & Permit header to view a line item’s release and permit information (if applicable).

   c) Click on the Budget Information header to view the line item’s budget/chartfield information and change as necessary.

   d) Once you have validated or updated the item’s information as necessary, click Save & Close.
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Now that you have updated or changed the purchase requisition information, navigate to the tabs on the left to validate or change the purchase requisition information as necessary:

- **Term tab**: View associated terms (i.e., a milestone type or subscription type of term where purchase orders are released to the supplier according to a set schedule) or create new terms by clicking Create Term.
- **Workflow tab**: View the current status and the approval history of the purchase requisition.
- **Pcard tab**: View the associated Pcard or update the purchase requisition with a new Pcard as necessary.
- **Controlling Board tab**: View the purchase requisition’s Controlling Board or Direct Purchase Authority information. Ohio Buys 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.
- **Release & Permit tab**: View release and permit information associated with the purchase requisition.
- **Requisite Program tab**: View if the purchase requisition is undergoing review by a Requisite Procurement Program.

Once you have reviewed and updated the purchase requisition as necessary, click **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, which is sent to the previous step in the approval workflow to resolve.

*If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email ([ohiosharedservices@ohio.gov](mailto:ohiosharedservices@ohio.gov)) or phone (877-644-6771).*