

Ohio|Buys Tips & Tricks

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Navigation Tools

1. Navigation Buttons

Use the navigation buttons to move between pages in Ohio Buys.



From left to right, these buttons are:

a. Back Button

Use the **Back** button to navigate to the previous page. This is more reliable than using your browser's back button.

b. History

Use the **History** button to navigate back to any page you have visited in this session.

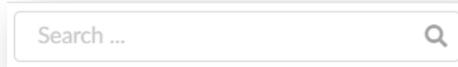
c. Favorites

Click the **Favorites** button on any page in Ohio Buys to access your shared favorites. You can add any page to your favorites by clicking the favorites button, adding a title, and clicking "Add Page"

2. Searching

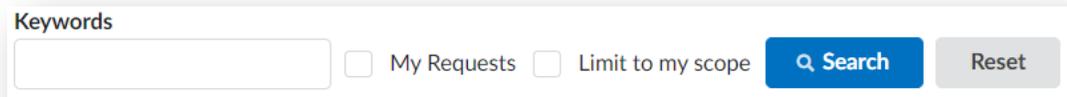
a. Universal Search

Use the Universal Search bar to search across a variety of items in Ohio Buys, including Supplier records, PRs, and POs. When searching for a PR, PO, receipt, etc., you must enter at least 4 digits.

A rectangular search bar with a light gray border. Inside, the text "Search ..." is displayed in a light gray font. A magnifying glass icon is positioned at the right end of the bar.

b. Browsing

When browsing in Ohio Buys (e.g., on the Browse Requisitions page) you can use the keywords search at the top of the page. As you enter values in this field, search recommendations will appear in a drop-down menu which can then be selected.

A search interface for keywords. It features a text input field on the left. To its right are two checkboxes: "My Requests" and "Limit to my scope". Further right is a blue button with a magnifying glass icon and the text "Search". On the far right is a gray button with the text "Reset".

You can also perform an advanced search by clicking the **Advanced Search** icon on the left side of the screen.



When using keywords or advanced search, be sure to click the **Search** button rather than pressing Enter on your keyboard. In addition, whenever you enter values in a field that has a **Selector** (▾) icon, be sure to select a value from the associated drop-down menu.

3. Saving

Save often when working on an object in Ohio Buys to ensure no data is lost. You can save an object by clicking the blue **Save** button.



4. Alerts

Alerts appear in Ohio Buys to guide the user in the creation of an object. There are two types of alerts:

- a. Blocking Alert - Blocks you from moving forward with the object until the source of the alert is rectified. Indicated by a red stop sign as below.



- b. Non-Blocking Alert: Alerts you to a potential issue within the item you are working on. Non-blocking alerts do not prevent you from advancing to the next step in the workflow, and are indicated by an orange caution sign as below.



5. Cart Icons

- a. White cart – Located next to the Universal Search field. This cart will take you to the checkout page from anywhere in Ohio Buys, and indicates the number of items in your cart with an orange number.



- b. Grey cart – Located on the Shop page, this cart opens a tabbed view of the items in your cart without taking you to the checkout page.



Functional Tips

1. Duplicating a PR

If you make the same purchase order frequently, you can duplicate an existing PR by clicking the **Duplicate** button. This carries over all valid items from the original, but does not carry over any attachments.



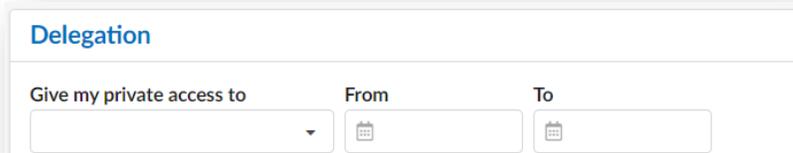
Note that sometimes to access the **Duplicate** button you will need to click **Other Actions** and select **Duplicate** from the drop-down menu

2. Lowest Price

When comparing items in Ohio buys, the lowest price will be highlighted with green text.

3. Delegating Approvals

If you are taking a planned leave of absence and need to delegate your approvals to another user, you may do so from your profile using the Delegation section.



The screenshot shows a 'Delegation' section with a title bar. Below the title bar, there are three fields: 'Give my private access to' (a dropdown menu), 'From' (a date picker), and 'To' (a date picker).

Note that Agency Admins are set up to approve on a user's behalf by default.

4. Bulk Editing Chartfields

You can edit the chartfield information for multiple items in a requisition simultaneously by selecting the checkbox icons next to the relevant items and clicking **Edit Lines**.



A pop-up window will open where you can choose chartfields that will be applied to all selected line items.

5. Pcard Expiration Dates

Your Pcard's expiration date is not scanned each time you enter a transaction. Be sure to confirm that your card is valid before submitting a purchase.

Clarifications

1. OAKS Integration

All AP Activities (incl. vouchering and payment processing) will continue to take place in OAKS. However, please note the following:

- Ohio Buys is integrated with OAKS, and payments made through OAKS can be tracked on the payments tabs of associated purchase orders.
- Orders created in Ohio Buys should only be edited in Ohio Buys (incl. budget information)
- Orders originating in OAKS prior to go-live will continue to be managed through OAKS

Visit our website for support and more information

The latest training updates and support documents are available on the [Ohio|Buys website](#).