Step-by-Step Instructions for Approving a Purchase Requisition

Log in to Ohio Buys. The My Pending Validations window on the Ohio Buys homepage shows your most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of EITC Workload Manager, EITC Analyst, EITC Supervisor or DAS management role (e.g., DCPO, CPO, etc.) as applicable to quickly view and take action on any purchase requisition needing your approval. Once you have found the task you would like to open, click on the **Object** name.

### EITC Workload Manager

1. After reviewing the contents of the IT purchase requisition, navigate to the **Workflow** tab.

2. Navigate to the bottom right of the Workflow tab to the **Performers of the following activities** section. Click the **Selector** (   ) icon and select the applicable EITC Analyst(s) to serve as approvers for the IT purchase requisition.

3. Click **Assign EITC Analyst**.
Approve a Purchase Requisition
( IT Purchase Requisition >$25,000 )

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EITC Analysts & Supervisors

1. After reviewing the contents of the IT purchase requisition, navigate to the IT Review tab.

2. Review the comments contained in the IT Review Blog. When you have finished, return to the Purchase Requisition tab.

3. Document all the key points in the IT Review Blog and make a recommendation on the purchase requisition header in the IT Release & Permit Recommendation section.

4. Click the Save button.

5. If desired, add any applicable attachments to the purchase requisition by clicking the Add Attachment button. Attachments are either internal-facing (i.e., Internal Attachment), Supplier-facing (i.e., Supplier Document), or are a internal justification document for the purchase (i.e., Justification Document).

5. After you have added your commentary and any applicable attachments to the purchase requisition, and if the purchase requisition is justified, select the EITC Analyst Approval or Approve (depending on your role) button to send the purchase requisition to the next step in the approval workflow. If the purchase requisition is not justified, select the EITC Analyst Reject or Reject (depending on your role) button. This sends the request back to the Requisitioner 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 sent via email to the Requester.

▲ If you would like to forward the purchase requisition, users can click the Forward button at the top of the page instead of clicking Submit. Note that forwarding a purchase requisition is additive. The requisition is removed from the Pending Validations section of the original user that forwarded the request; however, that user still has the ability to take action on it from the Browse Requisitions page. If either person takes action (i.e., the person who was originally assigned this requisition or the person you forward it to), the requisition will move on.
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DAS DCPO

1. Once the purchase requisition has received approvals from the EITC Analyst and Supervisor navigate to **IT Release and Permit Recommendation** to review the conclusions of the IT reviewers.

   ![IT Release and Permit Recommendation](image)

2. If the IT reviewers have determined that the purchase requisition is justified, click **Approve**.

   ![Approve](image)

3. A Release and Permit number will be assigned automatically. To view the release and permit information, navigate to the **Release and Permit** tab of the purchase requisition.

   ![Release and Permit](image)

▲ Note that depending on the value of the purchase requisition, it may advance to the DAS CIO, DAS CPO and DAS Director for additional approvals. All of these approvers should review the contents of the IT Release and Permit Recommendation section and click either Approve or Reject as appropriate.

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