Overview of the Homepage

A Clicking on the Ohio Buys logo at any time will take you to the homepage.

B Using the Navigational Icons will take you back a page ( ), let you view your history ( ), or save the current page as a favorite ( ).

C The Main Menu Navigation Bar includes options available and applicable to you. Click on a main menu option (e.g., Suppliers, Sourcing, Contracts, etc.) to display its associated drop-down menu.

D The My Pending Validations box displays tasks awaiting your review and approval. Clicking the hyperlinks will route you to the associated page to complete the necessary task.
The **My Profile** link displays your account profile and enables you to update your personal information (e.g., name, email address, phone/fax number, default shipping address, Pcards associated with your account).

▲ For security purposes, your Pcard information will not automatically populate in Ohio|Buys and must be manually entered:

- Double-check you have correctly entered your 16 digit Pcard number and 3 digit security code since this information is not validated until a Pcard transaction is submitted (no dashes or spaces between numbers)
- Your Pcard number will be masked and you will be unable to edit it once you have added it to your profile
- If you need to make changes to an existing Pcard, click the **Trash Can** icon to remove your current Pcard and add a new Pcard with the correct details
- Your Pcard details remain invisible to other users

The **My pending validations** link allows you to view and complete open workflow tasks assigned to you (e.g., Purchase Requisition Approvals).

The **My Scheduled Tasks** link allows you to view and complete open scheduled tasks, such as improvement plan tasks that have been assigned to you. Scheduled tasks will become more frequently used as part of future Ohio|Buys releases.

The **My addresses** link displays your address(es) and enables you to update or add a new address.
The **Logout** option will close Ohio|Buys and bring you back MyOhio. From the MyOhio page, click on your user icon in the top right of the page and select **Logout**. In addition, you will also be logged out Ohio|Buys after 20 minutes of inactivity.
Overview of a Typical Individual Page (1/2)

**A**

The **Page Name** is the name of the page you are on and it is displayed in the top left corner of the page.

![Page Name](image)

**B**

The wording of **Action Buttons** will vary by user role and the task being completed and are sometimes unavailable to certain users on specific pages. Use these buttons to take action on a particular task:

- **Green Buttons**: Submitting an action.
- **Red Buttons**: Canceling or rejecting an action.
- **Light Blue Buttons**: Saving an action.
- **Dark Blue Buttons**: Performing an optional or additional action.

![Action Buttons](image)

**C**

The **Functional Tabs** are located on the left side of a page. Every major task is organized by functional tabs. Clicking on these enable you to see additional information related to a specific task (e.g. Purchase Requisition or Pcard).

![Functional Tabs](image)
Alerts, if applicable, will not only vary by type, but the specific wording of each alert will vary by page and task. Alerts typically notify you of missing information, expiring documents, or new data required for a particular task. There are two types of alerts:

- **Red Blocking Alerts**: Prevent you from completing a particular task (e.g., submitting a purchase requisition for approval) until action is taken to resolve the alert.
- **Yellow Caution Alerts**: Serve as a warning and are usually a request for additional information or documentation.

**Required Fields** are denoted by a red asterisk at the top right of the field and require you to input applicable information before moving forward.

The **Information Icon** (ℹ️) displays a tool tip which can provide helpful information regarding the specific field.
Overview of a Search Functions

A. The Universal Search option appears in the upper right-hand corner of every page and enables you to enter keywords to initiate a search across all modules in Ohio|Buys.

When using this search, it is recommended to enter at least the last 4 digits of a purchase requisition, purchase order, or contract to quickly find what you are looking for. Users can also search for other objects such as receipts, release and permits, and Suppliers.

B. The Browse Search option appears when you click on Browse within a drop-down menu from Main Menu Navigation Bar (e.g. Browse Supplier, Browse Items). Using this option will only search that specific page (e.g., searching in Browse Suppliers will only provide results from the Supplier page).

C. The Advanced Search option appears when you click the More Filters icon (▼) on the left side of a Browse page. Using this option enables you to further narrow your search results. The available fields will vary based on the selected tab.
Overview of a Search Functions: Quick Tips

Whether the Browse Search or Advanced Search option is used:

- You can customize the way you view your search results on the search results page by right-clicking on a specific column header, selecting the name of the column header, and dragging/dropping it.
- From the results page, you are also given the option to export their search results to an Excel spreadsheet.
- Clicking the **Reset** button clears your search terms and returns you to your original search page (e.g., Browse Items).

For fields that have a **Selector icon** ( ), you must enter text into the field and then select a result from the drop-down BEFORE clicking **Search**. If you type in a word (e.g., Allstate) and it appears in the drop-down and you click **Search** before selecting it from the drop-down menu then your search will not search your keyword.

In addition, you can also click **See All** at the bottom of the drop-down menu to perform a detailed search on a field that has a Selector icon.

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