There are a number of places in Ohio|Buys where it may make sense to forward an item to obtain another user's approval. When an item is forwarded in Ohio|Buys, the user who is forwarded the item will receive an email notification informing them of the forwarded item as a pending validation on their Ohio|Buys. Once an item has been forwarded, the forwarded user can then review the item and take action on it as needed. For most forwarded items, either the original user or the forwarded user can take action on the item to advance the workflow along (i.e., the forwarding functionality does not require both users to approve before the workflow advances).

In addition, when an object is forwarded, the approval history will only log the name of the user who acts on the item; however, you can see the full log of notifications related to an item in the mail history. So for example, if User 1 forwarded a purchase requisition to User 2 and User 2 was the user who approved the purchase requisition, the approval history would only show User 1’s name, but the mail history would show that User 1 and User 2 both received the purchase requisition for review.

There are nuances to using the forwarding functionality depending on the item you are forwarding, which are explained in the table on the next page. However, the procedure to forward an item is the same.

1. Navigate to the item that you wish to forward and click the **Forward** button.

2. Select the user that you would like to forward the approval to from the dropdown menu.

3. Click **Save & Close**.
# Forwarding in Ohio|Buys

## A Guide to Forwarding in Ohio|Buys

<table>
<thead>
<tr>
<th>Item</th>
<th>Forwardable Step(s)</th>
<th>Who can it be forwarded to?</th>
<th>Details</th>
</tr>
</thead>
</table>
| Contract        | Legal Approver
                Other Approver 1
                Other Approver 2
                Other Approver 3
                Other Approver 4                                              | Users assigned the Additional Approver role                   | The legal approver(s) on the contract team can forward to any user with 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 |
| Public Records  | 1. Records Request Review
                2. Cancel                                                  | 1. All Ohio|Buys users
                2. State Admin (No Contract Approver)                      | A Public Records Request can be forwarded to any user in the system                                                                                                                                      |
| RTP             | Complete Sourcing Event                                  | All Contract Analysts                                          | The assigned user can forward the step to any Contract Analyst                                                                                                                                         |
| Solicitation    | 1. Ad-hoc Approver
                2. Assign Posting Approver
                3. Posting Approval
                4. Records Review                                            | 1. Ad-hoc Approvers on the project team
                2. New Sourcing Responsible on the team
                3. Posting Approvers on the team
                4. Ad-hoc Approvers on the team                              | For any user to be forwarded any step of the solicitation process, make sure the user is on the project team.                                                                                                 |
| Purchase Requisition | All purchase requisition approver steps                   | 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 |