

Ohio | Buys

Connecting Buyers and Suppliers

Working with Purchase Requisitions in Ohio|Buys

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Prepared for agency end-users responsible for creating, updating, reviewing, and approving purchase requisitions in Ohio|Buys.

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In This Document:

Overview: This learner guide covers the core activities related to creating, reviewing, approving, and managing purchase requisitions in Ohio|Buys. Information related to more specific scenarios, as well as information specific to your agency can be found in the Appendix and the Addendum respectively.

Processes Covered:

- 1) Accessing Ohio|Buys:** Ohio|Buys can be accessed by logging in to MyOhio with your OH|ID and password. Once logged in, users have a variety of tools available for navigation including quick-access icons and a powerful universal search feature.
- 2) Shopping:** Ohio|Buys contains a robust hosted catalog with items from a wide variety of Suppliers, as well as access to external punchout catalogs for some Suppliers. Ohio|Buys also allows users to add non-catalog, or freeform, line items to their shopping cart when required.
- 3) Submitting and Updating Purchase Requisitions:** After identifying the items needed, users must complete and submit a purchase requisition within Ohio|Buys. Certain items, quantities, and payment methods require users to complete different fields. Once submitted, users can monitor the progress of their purchase or cancel as needed.
- 4) Approving:** Most purchase requisitions will require approval from various agency approvers. Approvers will be responsible for reviewing different parts of the requisition, as their role requires. The system limits an approver's ability to edit depending on the role they have been granted.



Purchase Requisition Approval Path:

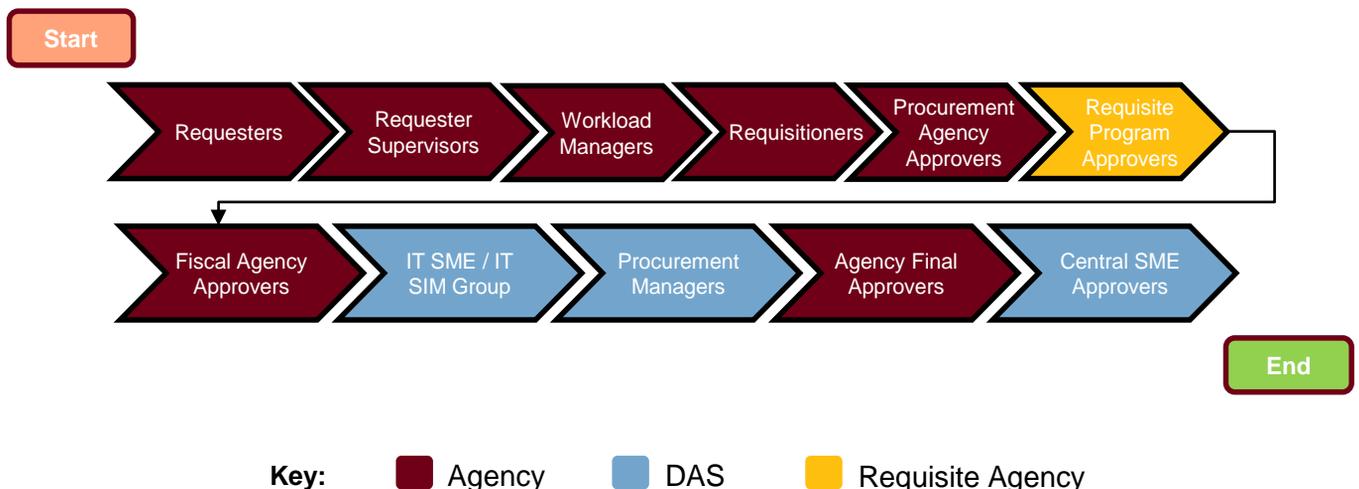
Approval Workflow

Most purchase requisitions in Ohio|Buys follow the approval workflow displayed at the bottom of this page. Once a purchase requisition has been submitted, it is automatically routed through the submitting user's unique agency approval path. At each step, the relevant approver examines the purchase requisition for compliance with agency, budgetary, or State policies, and approves or rejects the purchase requisition. Once a purchase requisition has received all the necessary approvals, a purchase order will be automatically created and an email notification will be sent to the Supplier.

Agency-Specific Variations

Each agency has the option to customize its agency approval workflow. Because of this, there may be variations to this process specific to your agency, such as including multiple approvers at a particular step. Agency approval rules are managed and maintained by Agency Administrators.

Approval Path



* IT SME Approval only required for IT purchases.

**Non IT SME approval occurs after agency final approval if the purchase is for Copy, Printing, Professional Services, or Fleet.

ACCESSING AND NAVIGATING OHIO|BUYS

Topics

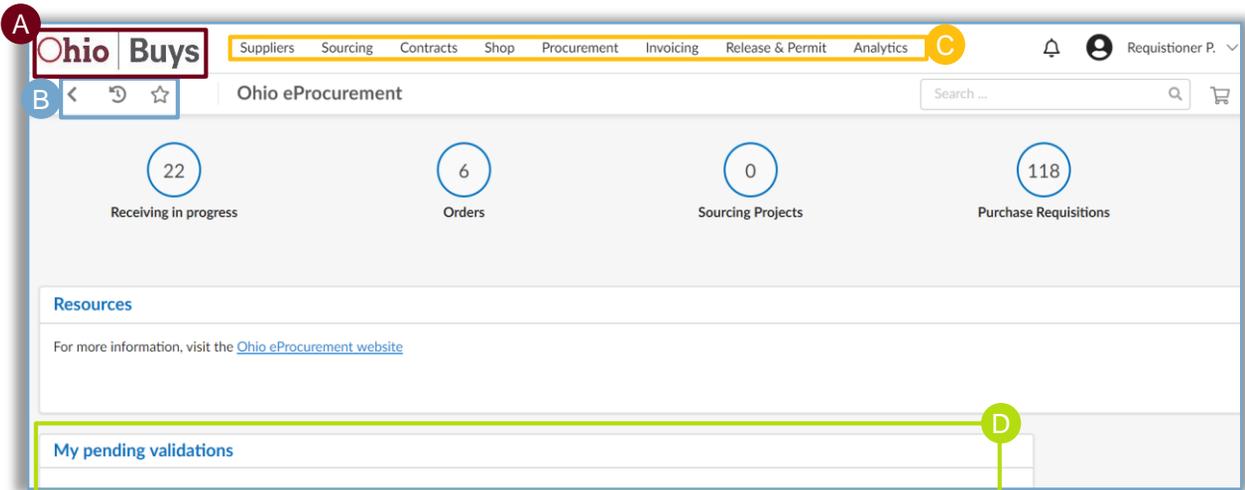
- General Navigation
- Manage Profile Settings

GENERAL NAVIGATION

Overview:

- What's Covered: This section covers the basics behind using and navigating Ohio|Buys including buttons, field names, search capabilities, and more
- Roles: Applies to all users
- Used When: Reference this when first getting started in Ohio|Buys

Overview of the Homepage



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

A



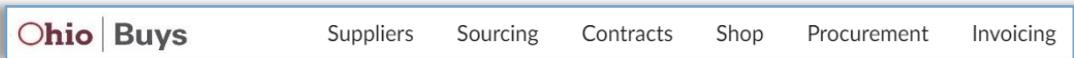
Using the **Navigational Icons** will take you back a page (<), let you view your history (↻), or save the current page as a favorite (☆).

B



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.

C

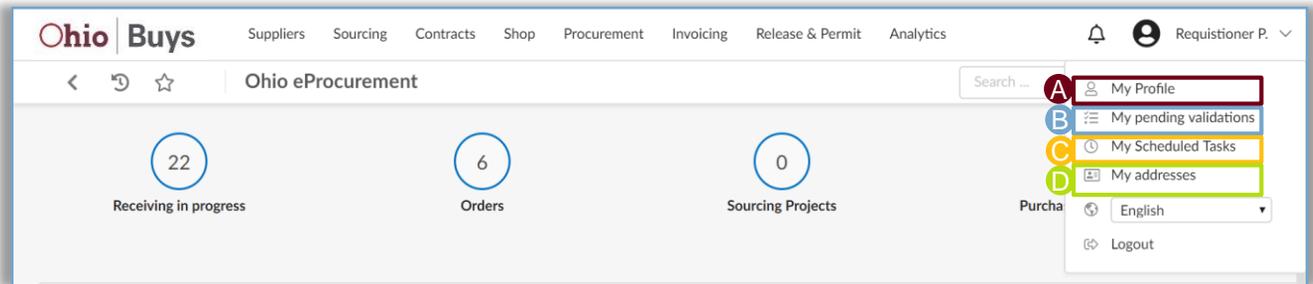


The **My Pending Validations** box displays tasks awaiting your review and approval. Clicking the hyperlinks will route you to the associated page to complete the necessary task.

D

My pending validations			25 Results
Process	Action	Object	History
RFx Quick Quote	Notify Suppliers	DRC Wet Mops for Operations	
Ohio Receipt Workflow 2	Confirm Receipt	REC000224 - Delivery of 6/24/2019 - 1GENERAL TEMPERATURE CONTROL INC. - 06/24/2019	
R2 Blanket Order Workflow	Requisitioner Review	PO00000789 - Copy of Req. 6/20/2019-1GENERAL TEMPERATURE CONTROL INC. - 1GENERAL TEMPERATURE CONTROL INC.	

Overview of Navigation Options (1/2)



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).

 My Profile

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

A

- 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

B

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

 My pending validations

C

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.

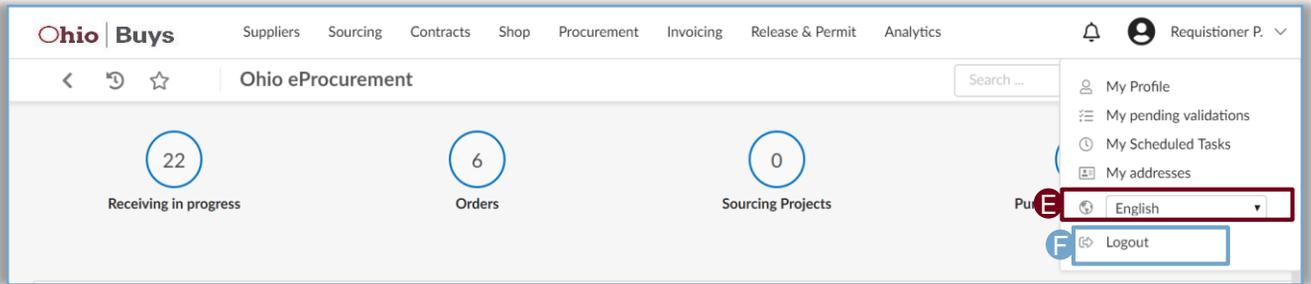
 My Scheduled Tasks

D

The **My addresses** link displays your address(es) and enables you to update or add a new address.

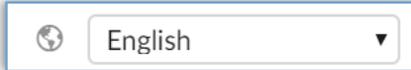
 My addresses

Overview of Navigation Options (2/2)



E

The **Globe or Language drop-down Menu** allows you to choose and set your language preference.

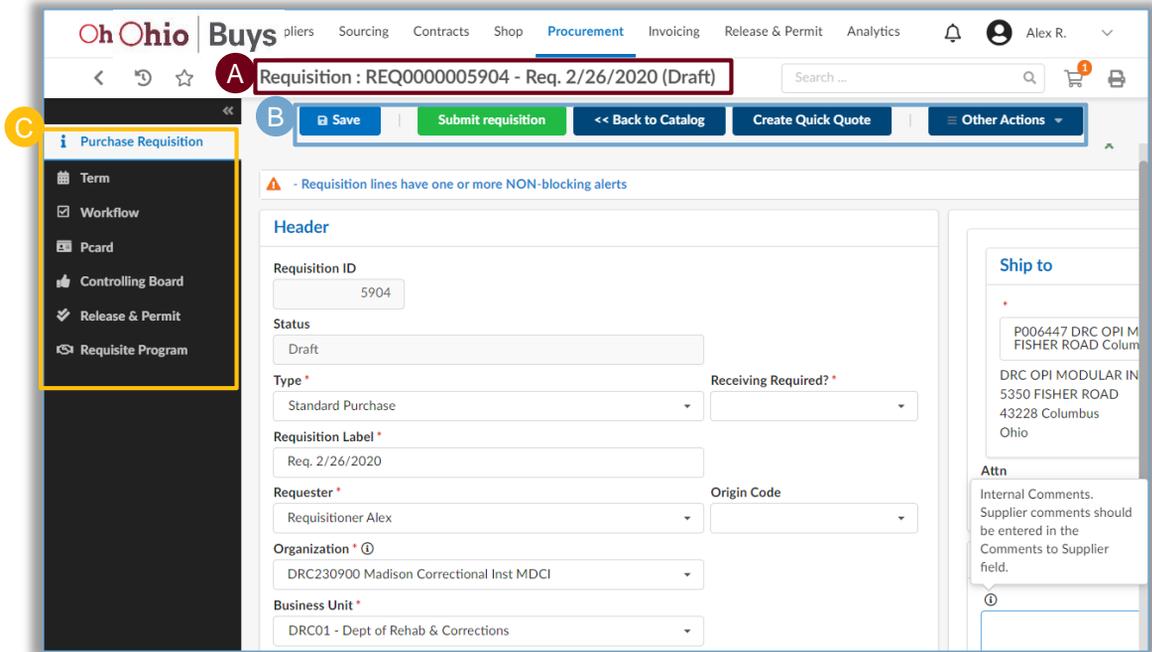


F

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.

Requisition : REQ000005904 - Req. 2/26/2020 (Draft)

B

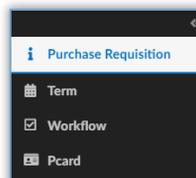
The wording of **Action Buttons** will vary by user role and the task being completed and are sometimes unavailable to certain users on specific pages. Use these buttons to take action on a particular task:

- *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.



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).



Overview of a Typical Individual Page (2/2)

The screenshot displays the Ohio Buys Procurement interface for a requisition titled "Requisition : REQ000005904 - Req. 2/26/2020 (Draft)". The page includes a navigation menu on the left with options like Term, Workflow, Pcard, Controlling Board, Release & Permit, and Requisite Program. The main form area contains the following fields:

- Requisition ID:** 5904
- Status:** Draft
- Type *:** Standard Purchase (with a red asterisk indicating a required field)
- Receiving Required? *:** (with a red asterisk indicating a required field)
- Requisition Label *:** Req. 2/26/2020 (with a red asterisk indicating a required field)
- Requester *:** Requisitioner Alex (with a red asterisk indicating a required field)
- Origin Code:** (empty field)
- Organization * ⓘ:** DRC230900 Madison Correctional Inst MDCI (with a red asterisk and an information icon)
- Business Unit *:** DRC01 - Dept of Rehab & Corrections (with a red asterisk)

Annotations on the screenshot include:

- D:** A yellow alert box stating "- Requisition lines have one or more NON-blocking alerts".
- E:** A red box highlighting the "Type", "Receiving Required?", "Requisition Label", and "Requester" fields.
- F:** A blue box highlighting the "Ship to" address field, which includes the address: "P006447 DRC OPI M FISHER ROAD Colum", "DRC OPI MODULAR IN", "5350 FISHER ROAD", "43228 Columbus", "Ohio".

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:

D

- 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.

E

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 image shows a close-up of the "Requisition Label" field. The field is labeled "Requisition Label *" with a red asterisk. The value entered in the field is "Req. 6/11/2019".

F

The **Information Icon** (ⓘ) displays a tool tip which can provide helpful information regarding the specific field.

Overview of a Search Functions

The screenshot displays the 'Browse Items' page in the Ohio Buys system. At the top, the navigation bar includes 'Suppliers', 'Sourcing', 'Contracts', 'Shop' (highlighted), 'Procurement', 'Invoicing', 'Release & Permit', 'Analytics', and a user profile for 'Alex R.'. A search bar in the top right corner is labeled 'A'. On the left side, a sidebar contains filter options for 'Commodity', 'Supplier', 'Status', and 'Kits', along with checkboxes for 'Show non valid items', 'Punchout only', and 'Generic Product'. A 'Reset' button is located at the top of this sidebar, which is highlighted with a yellow box labeled 'C'. The main content area features a search box with a 'Search' button and a 'Reset' button, highlighted with a blue box labeled 'B'. Below the search box, there are filter tags: 'Item tag: Dealer', 'Mandatory- DAS Contract', 'Mandatory- First Requisite Programs', 'Mandatory- Second Requisite Programs', and 'MBE Set-aside'. A table below shows a list of items with columns for 'Quantity', 'Image', 'Commodity', 'Product Code', 'Supplier', 'Name', and 'Product Sumr'. The first item is 'Masking Tape, Premium, 1/2", 72 rolls per case' from 'CINCINNATI ASSOCIATION FOR THE BLIND'. A table with 7 columns and 1 row is shown below the filters.

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.

A

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

The screenshot shows the 'Browse Items' page in the Ohio Buys system. At the top, there are navigation tabs: Suppliers, Sourcing, Contracts, Shop (active), Procurement, Invoicing, Release & Permit, and Analytics. A search bar is located at the top right. Below the search bar, there are filters for 'Item tag' with several active tags: Dealer, Mandatory- DAS Contract, Mandatory- First Requisite Programs, Mandatory- Second Requisite Programs, and MBE Set-aside. A table of search results is displayed below the filters. The table has columns for Quantity, Image, Commodity, Product Code, Supplier, Name, and Product Summary. One item is visible: 'Masking Tape, Premium, 1/2", 72 rolls per case' with a quantity of 1 and an 'Add to Cart' button. A 'Reset' button is highlighted in the top left corner of the search area.

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)

Reset

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.

MANAGE PROFILE SETTINGS

Overview

- What's Covered: This section discusses how to manage your profile settings and establish defaults in Ohio|Buys
- Roles: All Ohio|Buys users
- Used When: Setting up an account for the first time in Ohio|Buys

Step-by-Step Instructions for Managing Profile Settings

1 Log in to Ohio|Buys. From the Main Menu Navigation bar, click your profile name in the top-right corner of the page and select **My Profile** from the drop-down menu.

2 Your Profile Management page is displayed. On this page, you can update a variety of preferences and identifying information, including your default purchase requisition information. Scroll to the bottom of the page to find your Default settings.

▲ Updating your default purchase requisition information enables the auto-population of key form fields and accelerates the purchase requisition submission process.

Under Default settings, search and select your preferred inputs to the following fields:

a) Search for and select your **Main Organization**, which is the agency you regularly submit requisitions for.

b) Search for and select your **Favorite Departments**, which are the departments you regularly submit requisitions for. To add favorite departments, click **See All**. On the pop-up window, remove any filter and search for your favorite departments. Select your favorite departments from the search results.

c) Search for and select the **Ship to** address, which indicates the shipping address you would like your goods and/or services delivered to.

d) Search for and select the **Bill to** address, which indicates the billing address you would like the cost of your goods and/or services billed to.

The screenshot shows the 'Default settings' form with the following fields and callouts:

- A** Main Organization: A dropdown menu with 'DPS-Dept of Public Safety' selected.
- B** Favorite Departments: A dropdown menu with 'DPS200000 - OHIO STATE HIGHWAY PATROL' selected.
- C** Ship to: A dropdown menu with 'P005431 DPS STATE HIGHWAY PATROL OHIO STATE HIGHWAY PATROL COLUMBUS' selected.
- D** Bill to: A dropdown menu with 'P005431 DPS STATE HIGHWAY PATROL OHIO STATE HIGHWAY PATROL COLUMBUS' selected.

4 Click the **Save** button at top of the screen to retain your default purchase requisition information for future transactions.

Step-by-Step Instructions for Managing Profile Settings

To review information related to the approval chain, such as the Immediate Supervisor and Chief Information Officer, refer to the **Approval Escalation** section on the **User Preferences** tab. The roles assigned to these users influence the approval workflow routing.

Role	User	User
CIO	Rodgers Ervan	
DAS CPO	Sanders Kelly	
DAS Director	Damschroder Matthew	
DCPO	Herrel Angeline	
DCPO	Sanders Kelly	

5 Result(s) ⚙️

5

- The **Role** shows the title or role of the user listed in the **User** column. To find a specific role, sort this column in alphabetical order by clicking the column title.
- The **User** column shows the name of the user that occupies in the role.
- The search results are organized onto one or multiple pages. To navigate through the various pages, select the page number at the bottom of the section.

Step-by-Step Instructions for Managing Profile Settings

- ▲ If you are out of the office for an extended period of time, your profile settings can be adjusted so that all future tasks are delegated to another user. This will allow the other user to take action on the task, while still allowing you to take action on the task.

In the **Delegation** section, complete all of the necessary fields:

- Select the name of another user in the **Give my approval workflow tasks to** field.
- Select a date to start delegating tasks in the **From** field.
- Select a date to stop delegating tasks in the **To** field. If the delegation is supposed to occur indefinitely, then leave this field blank.

6

The screenshot shows the 'Delegation' section of the profile settings. At the top left is a blue 'Save' button. The section title 'Delegation' is centered. Below it are three fields: a dropdown menu labeled 'Give my approval workflow tasks to' (marked with a red circle 'A'), a date picker labeled 'From' (marked with a blue circle 'B'), and another date picker labeled 'To' (marked with a yellow circle 'C'). Below these fields is a search bar with the text '0 Result(s)'.

Click **Save** at the top of the page.

7



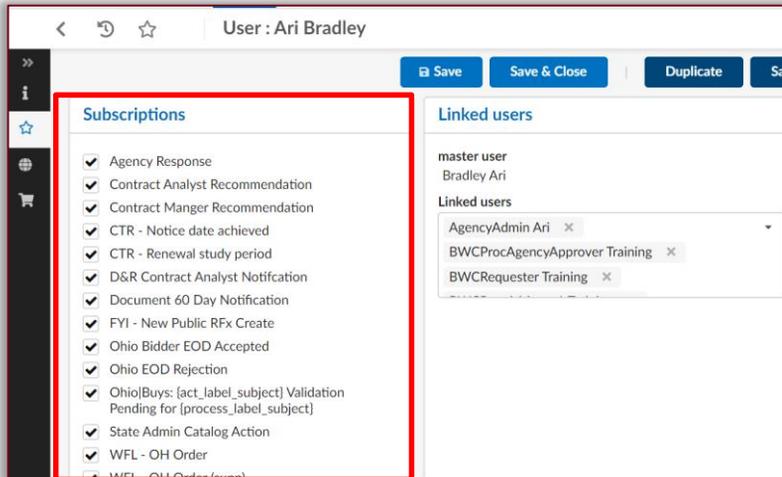
MANAGE EMAIL NOTIFICATIONS

Overview

- What's Covered: This section discusses how to manage your email notifications in Ohio|Buys
- Roles: All Ohio|Buys users
- Used When: Setting up an account for the first time in Ohio|Buys

Step-by-Step Instructions for Managing Email Notifications

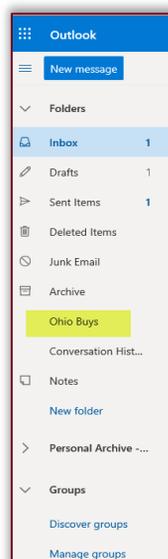
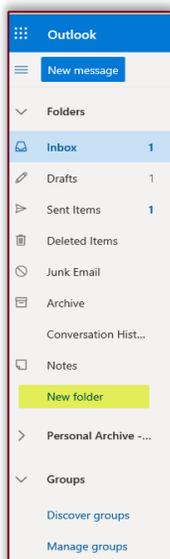
To manage email notifications, navigate to the **Subscription** section of the **User Preferences** tab.



1

- ▲ To disable the notifications related to pending approval tasks, deselect the option for *Ohio|Buys: (act_label_subject) Validation Pending for (process_label_subject)*. This option will disable all notifications.
- ▲ Alternatively, users can set up a special folder to sort all Ohio|Buys emails within their Outlook inbox by following the steps below.

Create a New Folder to store the emails by clicking **New folder** in the left-hand pane and name it "Ohio|Buys."

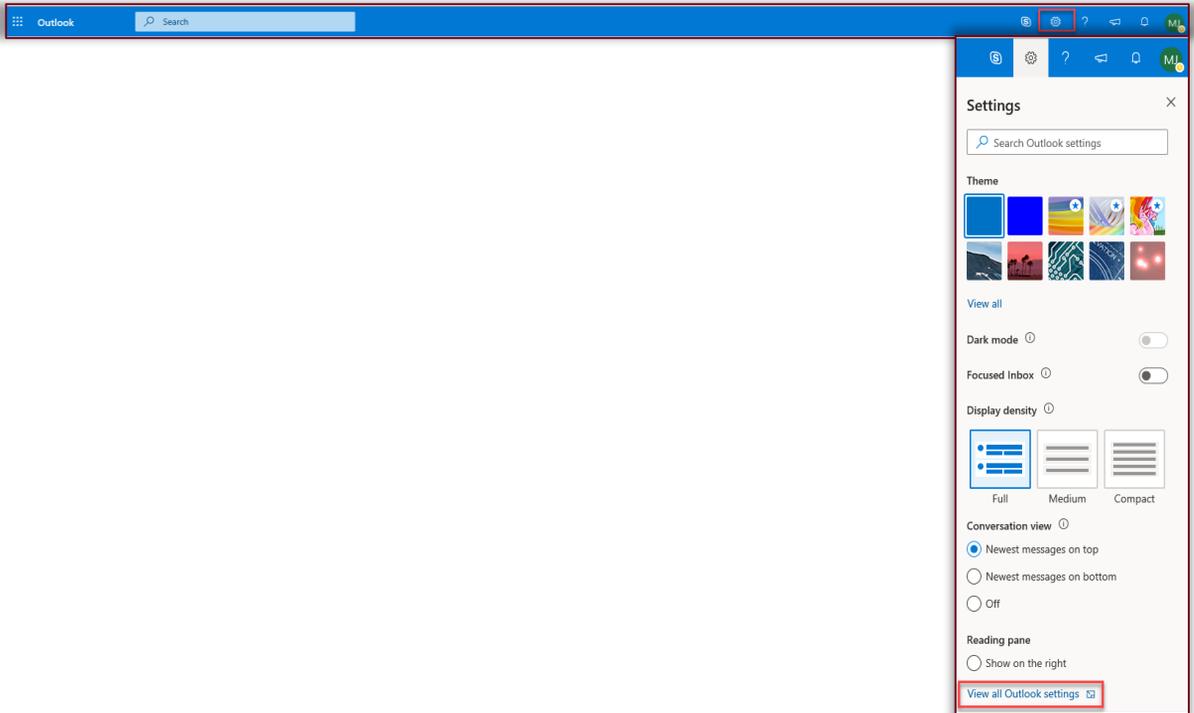


2

Step-by-Step Instructions for Managing Email Notifications

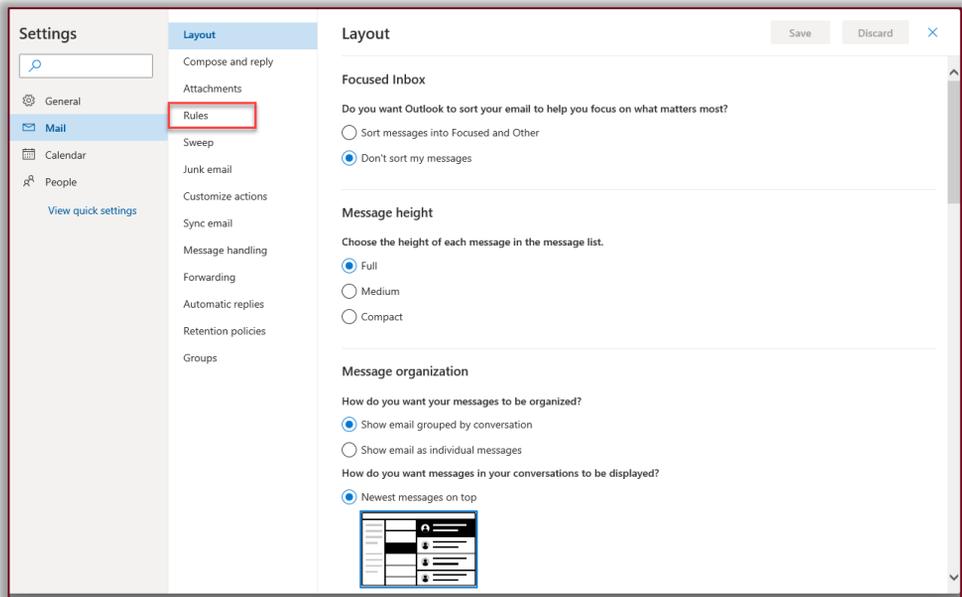
Click the Settings (⚙️) icon then click view all Outlook settings.

3



Click Rules.

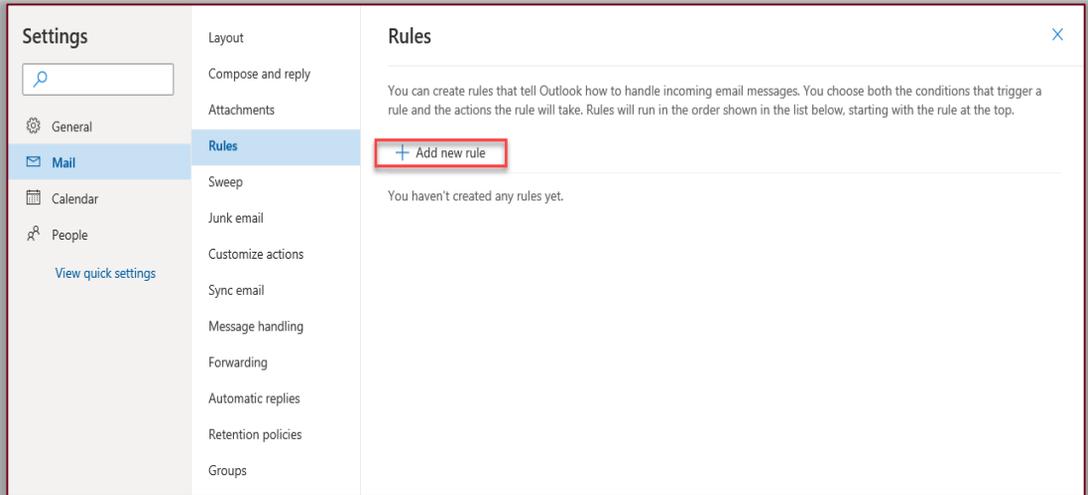
4



Step-by-Step Instructions for Managing Email Notifications

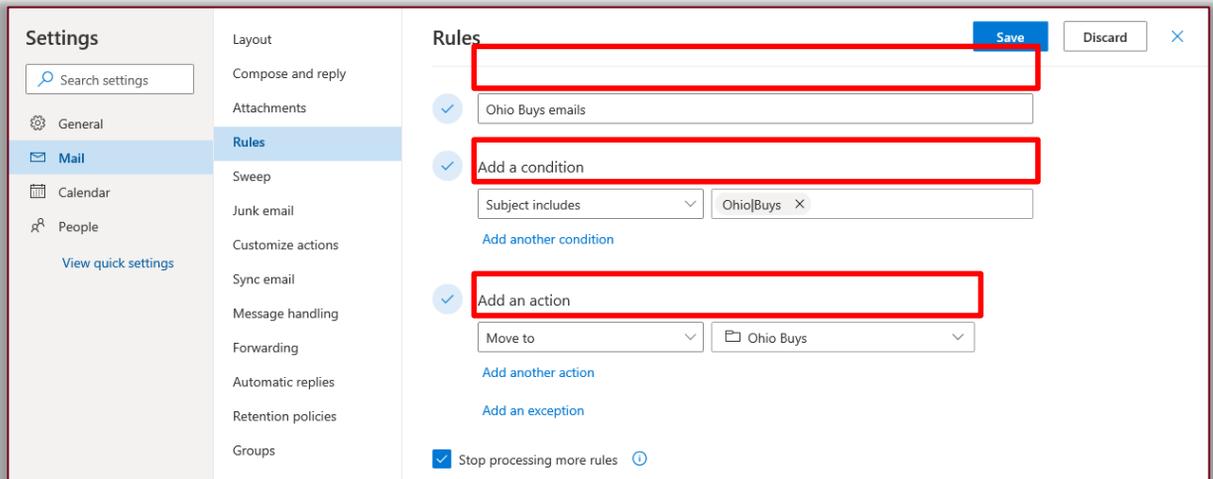
Click **+ Add new rule**.

5



Enter the rule information (i.e. name, condition and action) the below. Then click **Save**.

6



▲ In this example, we have added a rule called Ohio|Buys Email that has a condition to move emails whose subject includes in Ohio|Buys in to a folder called Ohio|Buys.

SUBMITTING PURCHASE REQUISITIONS

Topics

- Submit a Hosted Catalog Purchase Requisitions
- Submit a Punchout Catalog Purchase Requisition
- Submit a Freeform Purchase Requisition
- Review and Update a Purchase Requisition

Purchase Requisition Item Types

There are three main categories of items that can be purchased within Ohio|Buys: Hosted Catalog Items, Punchout Catalog Items, and Freeform Items. How to purchase each type of item will be discussed in more detail later in this Learner Guide.

Hosted Catalog Items: Items that are hosted on catalogs within Ohio|Buys. The entire shopping process, from searching, to submitting, takes place in Ohio|Buys.



Punchout Catalog Items: Items that are hosted on a Supplier's external Website. For punchout items, you will first identify the Supplier you wish to order from, and then "punchout" to their website to shop for the item(s) you need. After adding the item(s) to your cart, you will be returned to Ohio|Buys to complete the checkout process.



Freeform Items: Items that do not exist in either a hosted or a punchout catalog. Freeform line items are created by the Requester, and should only be created if no suitable alternative for the item in the purchase requisition exists in either a hosted or punchout catalog.

A screenshot of a form titled 'Describe the item'. The form contains several input fields: 'ID' (text), 'Name *' (text), 'Item Code' (text), 'Ordered Quantity *' (text) with a dropdown menu set to 'Each', 'Commodity *' (dropdown), and 'Profile ID' (dropdown). At the bottom, there is a partially visible field for 'Product type *'. The form has a light blue border and a subtle shadow.

Purchasing Services in Ohio|Buys

Coordinating purchases of services with a Supplier prior to completing/submitting a requisition is a best practice. In addition to making sure the Supplier is able to provide the service, this coordination assures that the buyer and Supplier are on the same page with respect to costs, scope of work, deliverables, and performance timeframes.

When submitting a purchase requisition for services, it's important to attach any documentation describing and supporting the reasons for and specifics of the purchase. This can be a letterhead quote, but it may also be a SOW document from the Supplier or copies of emails between the buyer and the Supplier. Detailed instructions on how to insert attachments, and the different attachment types can be found on pages [27](#), [34](#), [40](#), and [43](#).

All of this, of course, must be reviewed prior to authorizing the purchase and, as necessary, additional information can be requested from the buyer.

SUBMIT A GOODS AND/OR SERVICES REQUEST

Overview

- What's Covered: This section outlines the process for creating and submitting a request for goods and/or services in Ohio|Buys
- Roles: Requesters
- Used When: Purchasing items in Ohio|Buys

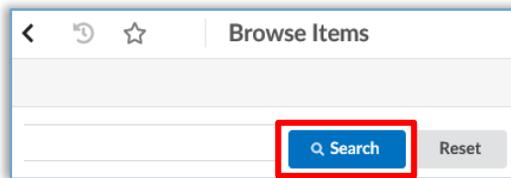
Step-by-Step Instructions for Submitting a Goods and/or Services Request

1

Log in to Ohio Buys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

2

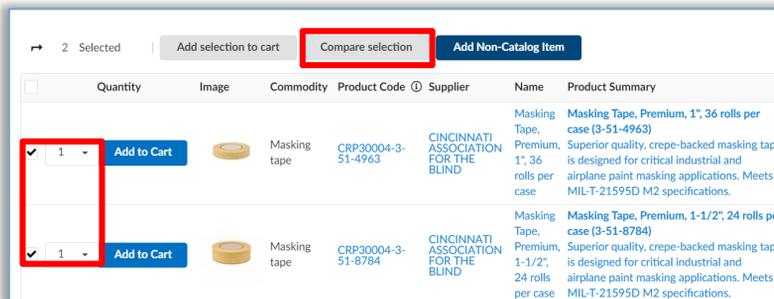
The Browse Items page is displayed. On this page, you can enter a variety of search terms to search for goods and services. Enter search terms and then click **Search**. By default, the search results on the Browse Items page are filtered to only show items that contain an item tag. An item tag indicates if an item is tied to a Mandatory First Requisite, Mandatory Second Requisite, or Mandatory DAS Contract. In addition, item tags also indicate if an item has Dealers or is linked to an MBE Set-Aside contract. In order to search for items that do not have any tags, you must remove the item tag filters from your search terms.



3

On the results page, choose your item(s) by selecting the checkbox(es) next to the item(s). Once you have selected the checkbox(es), you can adjust the quantity by either manually inputting the quantity or clicking the '+' or '-' symbol next to the shopping cart.

- ▲ You can also change the order in which columns are displayed in the search results by right-clicking on any column name. From the subsequent menu, drag and drop the order of the displayed columns to fit your needs.
- ▲ Items that are offered by multiple dealers will display as one-line item in the search results. Please refer to the *Order Items from a Dealer JA* for details.
- ▲ To compare items side-by-side on the Browse Items page, click the checkbox icons for the items you wish to compare and then click **Compare selection**.
- ▲ If you cannot find the good or service you would like to request, you will need to click the Add Non-Catalog Item button. Refer to the *Submit a Freeform Purchase Requisition JA* for details.



4

Once you have selected your item(s) and adjusted the quantity respectively, click **Add selection to cart**. Please note, in some scenarios, you may be prompted to select a feature (e.g., color, size, etc.) for the item you add to your cart.

Step-by-Step Instructions for Submitting a Goods and/or Services Request

5

The specified item has been added to your shopping cart. To begin the checkout process, click **Checkout**.

Checkout

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

6

- Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is "Office Supplies JD").
- Select your **Organization**, which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.
- Indicate if you would like receiving to be required in Ohio|Buys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in Ohio|Buys in order for any Supplier submitted invoices to be processed.
- Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '+' icon to provide a one-time delivery address.
 - ▲ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.
- If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).
- Click **Save**.

Step-by-Step Instructions for Submitting a Goods and/or Services Request



If you are applying your own Pcard to your purchase requisition, please refer to [Submit a Pcard Requisition](#) beginning with step 5 on pg. 33 for instructions on how to complete the purchase requisition.

7

On the right side of the page, update your billing address in the Bill To field. To complete this field, begin typing the address and then select it when it appears in the drop-down menu.

Bill To

*

P004009 ADJ CAMP PERRY ANG Attn: Kim Bower Port Clinton

ADJ CAMP PERRY ANG
Attn: Kim Bower
1200 N Camp Perry E Road
43452-9577 Port Clinton
Ohio
UNITED STATES

8

Enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level.

Request Description

 Internal Comments

Comments to Supplier

9

Click the **Save** button.



Step-by-Step Instructions for Submitting a Goods and/or Services Request

At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil** (✎) icon next to each line item to make your mandatory and/or optional additions to specific fields.

For each line item, you must select an **Order Supplier**, which is the address of the Supplier that will fulfill your order. It is also recommended that you select a **Supplier Contact** if one is available.

- a) On the right side of the page, select an **Order Supplier** from the drop-down menu.
- b) Select a **Supplier Contact** from the drop-down menu if one is available.

10

Select Supplier

Supplier
1ST CONNECT

Order Supplier ⓘ
1ST CONNECT

Supplier Contact

Supplier Location
CHK

To update the Order Supplier and Supplier Contact fields for multiple line items:

- 1) Click the **Pencil** (✎) icon next to one of the items to open it.

Items

Add a line Delete Lines Copy Selected Lines Edit Lines

0 Selected

Edit	#	Products types	Ref.	Item description	Supplier
<input type="checkbox"/>	9198-3	Product		Glass Filament, 1/2 in., 72 rolls p...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input checked="" type="checkbox"/>	9198-2	Product		Glass Filament, 48mm, 24 rolls per ...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input type="checkbox"/>	9198-1	Product		Class 2 Asphalt Safety Vest, S-3X, ...	(GOODWILL INDUSTRIES OF AKRON OHIO INC) GOODWILL INDUSTRIES C

- 2) Select the Order Supplier and Supplier Contact.

Select Supplier

Supplier
CINCINNATI ASSOCIATION FOR THE BLIND

Order Supplier ⓘ

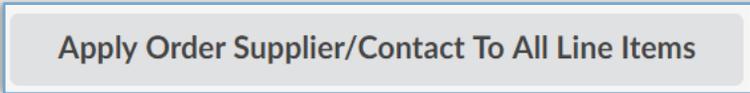
Supplier Contact

Step-by-Step Instructions for Submitting a Goods and/or Services Request

- 3) Click **Save**. You must save the Order Supplier and Supplier contact before applying the change to all line items in the order.

A blue rectangular button with a white border and a white floppy disk icon to the left of the word "Save".

- 4) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier and Supplier Contact for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.

A light gray rectangular button with a blue border and the text "Apply Order Supplier/Contact To All Line Items" in the center.

11

Once you have finished making updates to the line item's information, click **Save & Close**.

A blue rectangular button with the text "Save & Close" in white.

12

Continue making updates to any remaining line items. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit requisition**.

A green rectangular button with the text "Submit requisition" in white.

13

Your requisition has been submitted for review and has been sent to your supervisor for approval. Click the **Requisition Number** hyperlink to review its details.

- ▲ If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.
- ▲ To view the main agency approvers for your requisition, click **Workflow Main Approvals**.
- ▲ On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the requisition.

SUBMIT A PCARD PURCHASE REQUISITION

Overview

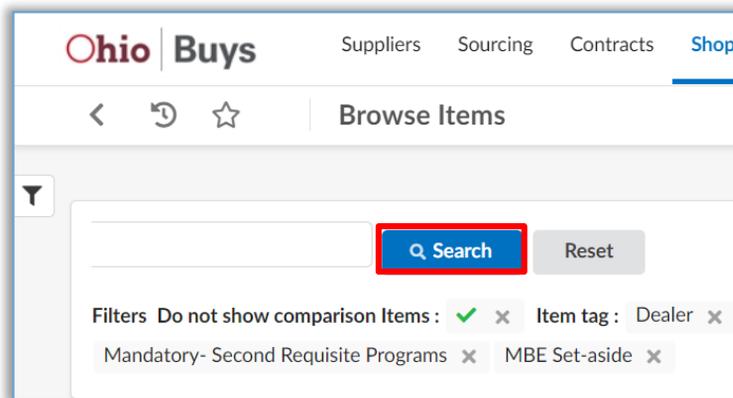
- What's Covered: This section outlines the process for creating and submitting a purchase requisition using a Pcard within Ohio|Buys
- Roles: Requesters, Requisitioners
- Used When: Purchasing items in Ohio|Buys with a Pcard

Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

▲ If you are completing an After-the-Fact Pcard purchase be sure to indicate this in the comments section. Otherwise the processes is unchanged.

1 Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

The Browse Items page is displayed. On this page, you can enter a variety of search terms to find goods and services on Ohio|Buys. You can easily search for items or punchout catalog Suppliers using the universal Keywords search.



2

▲ If no suitable alternative for the item you need is available in either a hosted or punchout catalog, you can create a freeform line item by clicking the **Add Non-Catalog Item** button.

Add Non-Catalog Item

▲ For more information on how to specifically purchase a hosted, punchout, or freeform line item, please refer to the next three chapters of this Learner Guide.

3 To begin the checkout process, click the **Checkout** icon.



4

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

The screenshot shows the 'Purchase Requisition' form for 'Req. 6/8/2020 (Draft)'. Callouts A-F highlight the following fields:

- A:** Requisition Label (Req. 6/8/2020)
- B:** Organization and Business Unit dropdowns
- C:** Receiving Required? dropdown (set to No)
- D:** Ship to address field with a '+' icon for adding a new address
- E:** Additional Agency Approvers dropdown
- F:** Save button

4

- Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is "Office Supplies JD").
- Select your **Organization**, which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.
- Indicate if you would like receiving to be required in Ohio|Buys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in Ohio|Buys in order for any Supplier submitted invoices to be processed.
- Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '+' icon to provide a one-time delivery address.
 - ▲ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.
- If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).
- Click **Save**.

5

Update the Purchase Requisition **Type** field to **Pcard Purchase** by selecting it from the drop-down menu

The dropdown menu for the 'Type' field shows the following options: Pcard Purchase, Standard Purchase, and Emergency Purchase. The 'Pcard Purchase' option is highlighted with a red box.

Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

6

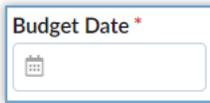
Click **Save**.



The Bill To address will automatically update to the Pcard billing address.

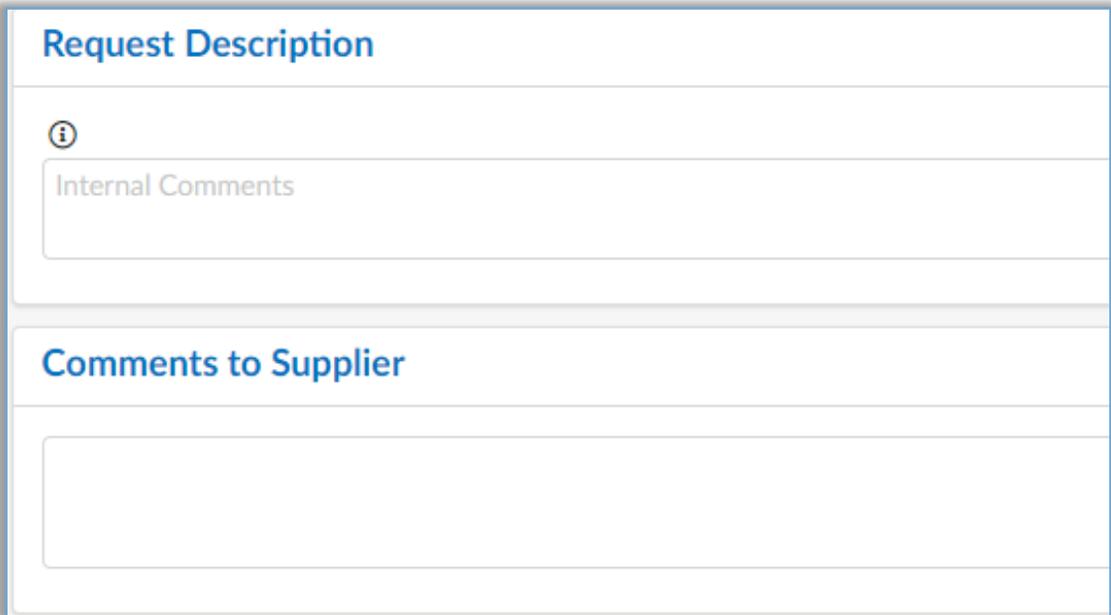
7

Select the **Budget Date**. By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year.



8

On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level. Information input in the Comments to Supplier field will be visible to Suppliers on the printed purchase order, however information in the Request Description field will not be.

A screenshot of a web form. The top section is titled "Request Description" in blue. Below the title is an information icon (i) and a text input field containing the placeholder text "Internal Comments". The bottom section is titled "Comments to Supplier" in blue and contains a large, empty text area for input.

9

Click **Save**.



Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

10

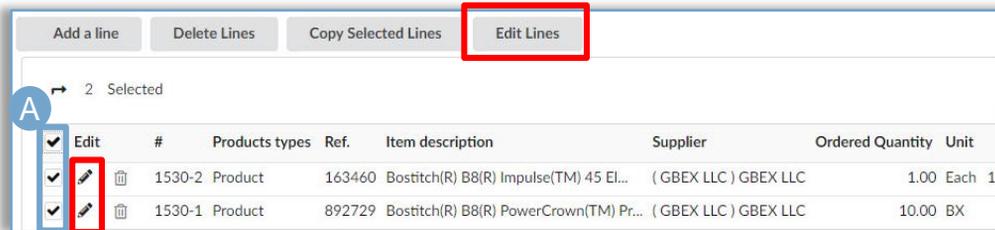
Click **Save**.



At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil** () icon next to each line item to make your mandatory and/or optional additions to specific fields (e.g., Supplier contact, ordered quantity, charfield information, etc.).

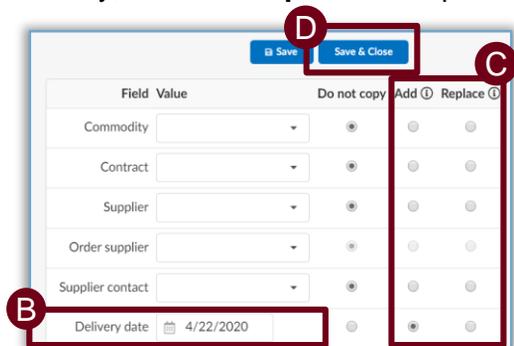
▲ If you want to edit multiple line items at one time (e.g., mass select a delivery date), complete the following:

- a) Click the **Individual Checkbox Icon** next to the individual line items to select multiple individual line items or click the **Select All Checkbox Icon** above the line items to mass edit all the line items and click the **Edit Lines** button.



11

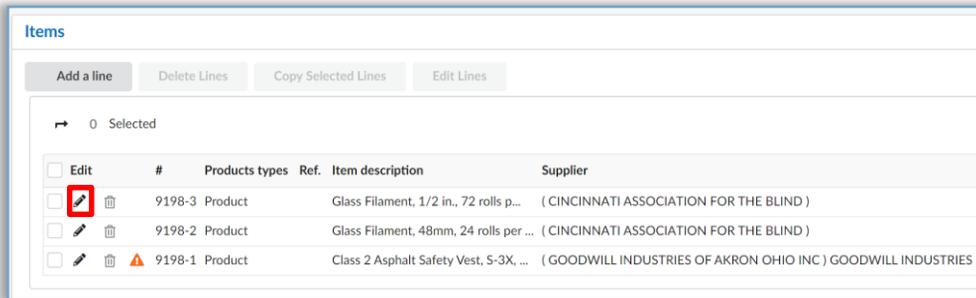
- b) To update the **Delivery Date**, select it from the **Delivery Date** field.
- c) Click the **Add** radio button or **Replace** radio button for each of the fields you updated. Note that **Add** will add a value in a blank field only, whereas **Replace** will replace the current value with the new one selected.
- d) Click the **Save & Close** button.



Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

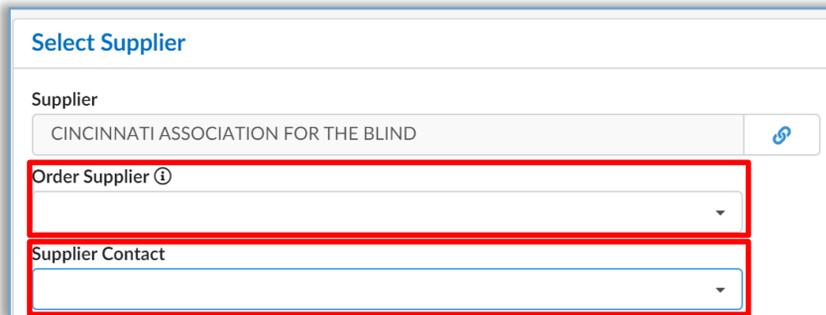
To update the Order Supplier and Supplier Contact fields for multiple line items:

- 1) Click the **Pencil** (✎) icon next to one of the items to open it.



	#	Products types	Ref.	Item description	Supplier
<input type="checkbox"/>	9198-3	Product		Glass Filament, 1/2 in., 72 rolls p...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input type="checkbox"/>	9198-2	Product		Glass Filament, 48mm, 24 rolls per ...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input type="checkbox"/>	9198-1	Product		Class 2 Asphalt Safety Vest, S-3X, ...	(GOODWILL INDUSTRIES OF AKRON OHIO INC) GOODWILL INDUSTRIES C

- 2) Select the Order Supplier and Supplier Contact.



Select Supplier

Supplier

CINCINNATI ASSOCIATION FOR THE BLIND

Order Supplier ⓘ

Supplier Contact

- 3) Click **Save**. You must save the Order Supplier and Supplier contact before applying the change to all line items in the order.



- 4) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier and Supplier Contact for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.

Apply Order Supplier/Contact To All Line Items

Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

When reviewing the line item details for an individual line item, you can update information in the following sections:

- a) **Describe the Item:** You are able to update the **Ordered Quantity** and **Delivery Date** fields as needed.
- b) **Select Supplier:** In some scenarios, you can select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. You should also update the Supplier Location field according to the information that Supplier has listed in OAKS.

A Describe the item

ID: 6215

Name: Masking Tape, Premium, 1/2" 72 rolls per case

Ordered Quantity: 1.00 Case

Commodity: 31201503 - Masking tape Pro MBE Set Aside M

Products types: Product MBE Set Aside

Delivery Date: 10/30/2019

B Select Supplier

Supplier: Capital Door Solutions Inc

Order Supplier: Capital Door Solutions Inc

Supplier Contact: DAHMAN JENNIFER

Supplier Location: EFT-1

Use Non-Default Supplier Location:

Dealers Available:

Controlling Board Number: [dropdown]

12

- c) **Pricing:** You are able to adjust the price for hosted and punchout catalog items, as needed. Whenever you adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document. The price can also be adjusted after conducting a quick quote within OhioBuys. Please refer to the [Create and Release a Quick Quote Solicitation](#) Job Aid for instructions on how to conduct a quick quote.
- d) **Define Delivery Place:** If desired, you can define a different delivery place for each item.

C Pricing

137.790 USD

Total Amount: 137.790

Supplier Quote ID: [input field]

D Define delivery place

Ship to: DRC OPI MODULAR INST WAREHOUSE 5350 FISHER ROAD Columbus

DRC OPI MODULAR INST WAREHOUSE
5350 FISHER ROAD
43228 Columbus
Ohio
UNITED STATES

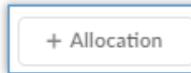
Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

e) **Budget Information:** Expand this section to add chartfield information for the line item.

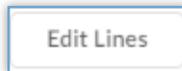
▲ The information entered in this section is the same information that was previously provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information. Chartfield information locks after the Fiscal Approver completes their review.

The screenshot shows a 'Budget Information' section with a sub-section for 'Filled In' and 'To be allocated'. The 'Filled In' section has radio buttons for 'Percentage' (selected) and 'Amount'. The 'To be allocated' field shows '0.000 %'. Below this is a table of dropdown menus for chartfields: Fund (GRF - GENERAL REVENUE), Account (521050 - OFFICE SUPPLY & EQ (NOT)), ALI (001699 - INVESTMENT EARNINGS), Department, Program (1001C - INTEREST LIABILITY PAYMENT), Grant/Project, Project, Service Location, Report, Agency Use, ISTV Xref, and Site (ADJ111000 Executive BEAR).

▲ When adding chartfield information, users can click **+ Allocation** to add an additional chartfield string.



▲ Users can update fields in multiple chartfield strings at once by clicking the **Checkbox Icon** () next to the strings they want to update and then clicking **Edit Lines**.



This opens the Allocation Mass Update page where users can apply chartfields to all selected lines.

The screenshot shows the 'Allocation Line Mass Update' form. It features a vertical list of dropdown menus for: Fund, Account, ALI, Department, Program, Grant/Project, and Project. At the top right, there are two buttons: 'Save' and 'Save & Close'.

Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

13

Once you are done making updates to the line item's information, click **Save & Close**.



14

Continue making updates to any remaining line items using Steps 12-13. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit requisition**.



- ▲ In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies. Please refer to the **Quick Quotes Learner Guide** for details on the Quick Quote process.

15

After your requisition has been submitted for review, you can check its approval status at any time.

- ▲ If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.
- ▲ On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.
- ▲ If no Additional Approvers are added, and the purchase is below the Controlling Board Threshold, then a Pcard order will be automatically generated for the purchase requisition.
- ▲ You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

SUBMIT A HOSTED CATALOG PURCHASE REQUISITION

Overview

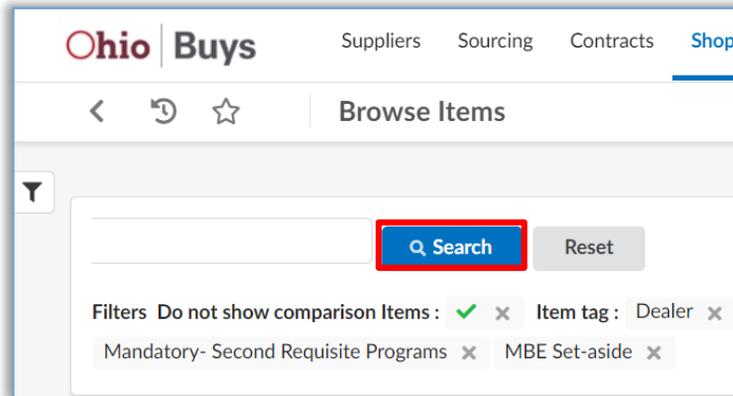
- What's Covered: This section outlines the process for creating and submitting a purchase requisition for items contained in a hosted catalog within Ohio|Buys
- Roles: Requesters, Requisitioners
- Used When: Purchasing items that are available directly within Ohio|Buys

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

1

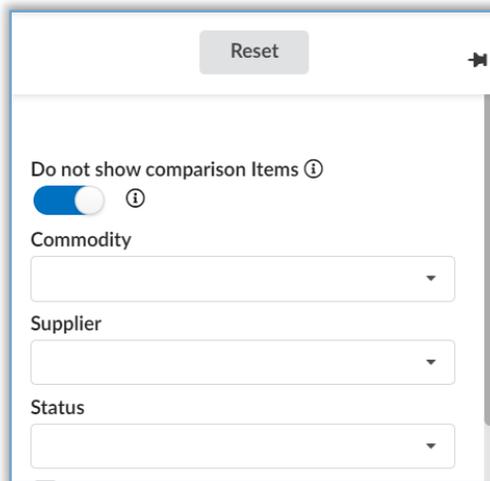
Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

The Browse Items page is displayed. On this page, you can enter a variety of search terms to find goods and services on Ohio|Buys. You can easily search for items using the universal Keywords search. After inputting your search criteria, click **Search**.



▲ To filter your search by other categories, such as Supplier or State Contract Number, click the **More Filters** (▼) icon and apply your filters in the appropriate fields.

2



By default, the search results on the Browse Items page are filtered to only show items that contain an item tag. An item tag indicates if an item is tied to a Mandatory First Requisite, Mandatory Second Requisite, or Mandatory DAS Contract. In addition, item tags also indicate if an item has Dealers or is linked to an MBE Set-Aside contract. In order to search for items that do not have any tags, you must remove the item tag filters from your search terms. Remove filters by clicking the **X** icon

Item tag : Dealer x Mandatory- DAS Contract x Mandatory- First Requisite Programs x Mandatory- Second Requisite Programs x MBE Set-aside x

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

On the results page, choose your item(s) by selecting the checkbox(es) next to the item(s). Once you have selected the checkbox(es), you can adjust the quantity by either manually inputting the quantity or clicking the '+' or '-' symbol next to the shopping cart.

- ▲ You can also change the order in which columns are displayed in the search results by right-clicking on any column name. From the subsequent menu, drag and drop the order of the displayed columns to fit your needs. (see [General Navigation](#) for more details)
- ▲ Items that are offered by multiple dealers will display as one line item in the search results. Please refer to the [Order Items from a Dealer](#) Job Aid for details.
- ▲ To compare items side-by-side in Ohio|Buys, click the Checkbox icons for the items you wish to compare and then click **Compare selection**.
- ▲ If you cannot find the good or service you would like to request, you will need to click the **Add a Non-catalog Item** button. Refer to the [Submit a Freeform Purchase Requisition](#) Job Aid for details.

3

The screenshot shows a search results table with the following columns: Quantity, Image, Commodity, Product Code, Supplier, Name, and Product Summary. Two items are listed, both with checkboxes checked and quantity dropdowns set to 1. The 'Compare selection' button is highlighted with a red box. The 'Add Non-Catalog Item' button is also visible.

Quantity	Image	Commodity	Product Code	Supplier	Name	Product Summary
<input checked="" type="checkbox"/> 1		Masking tape	CRP30004-3-51-4963	CINCINNATI ASSOCIATION FOR THE BLIND	Masking Tape, Premium, 1", 36 rolls per case (3-51-4963)	Superior quality, crepe-backed masking tape is designed for critical industrial and airplane paint masking applications. Meets MIL-T-21595D M2 specifications.
<input checked="" type="checkbox"/> 1		Masking tape	CRP30004-3-51-8784	CINCINNATI ASSOCIATION FOR THE BLIND	Masking Tape, Premium, 1-1/2", 24 rolls per case (3-51-8784)	Superior quality, crepe-backed masking tape is designed for critical industrial and airplane paint masking applications. Meets MIL-T-21595D M2 specifications.

4

Once you have selected your item(s) and adjusted quantities, click **Add selection to cart**. Please note that in some scenarios you may be prompted to select a feature (e.g., color, size, etc.) for your item(s).

5

The specified item will be added to your shopping cart. To begin the checkout process, click **Checkout**.

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

- 6
- Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is "Office Supplies JD").
 - Select your **Organization**, which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.
 - Indicate if you would like receiving to be required in Ohio|Buys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in Ohio|Buys in order for any Supplier submitted invoices to be processed.
 - Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '+' icon to provide a one-time delivery address.
 - ▲ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.
 - ▲ If you have the Requisitioner (On Behalf Of) role, you are able to update the **Requester** field if the purchase requisition is being created for another user.
 - If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).
 - Click **Save**.

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

If you would like to make this purchase a Pcard purchase, change the requisition **Type** by selecting **Pcard Purchase** from the drop-down menu, then click **Save**.

For more information on completing a Pcard purchase, please refer to [Submit a Pcard Purchase Requisition](#).

7

- Select the **Origin Code** based on the agency you're purchasing for. (Not required until the Fiscal Approver step, however Requisitioners can fill it out if they know it)
- Select the **Budget Date**. By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. The relevant fiscal year will populate in the **Fiscal Year** field, .
- Expand the **Purchasing Options** section. From this section, you can indicate if a **DAS sourcing event** is required, as well as if the purchase requisition is **Single Source** or **Sole Source**. In addition, you can also note if the purchase requisition should be put on hold, and/or if it should not be encumbered.
- Use the displayed radio buttons to make your selections. If you select that a **DAS sourcing event** is required, click the **Request DAS to Source** button to complete the associated request form, which will then be routed to DAS. Please refer to the [Submit a Solicitation Request](#) Job Aid for step-by-step instructions on how to complete this request form.

8

On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level. Information input in the Comments to Supplier field will be visible to Suppliers on the printed purchase order, however information in the Request Description field will not be.

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

9 Click the **Save** button.



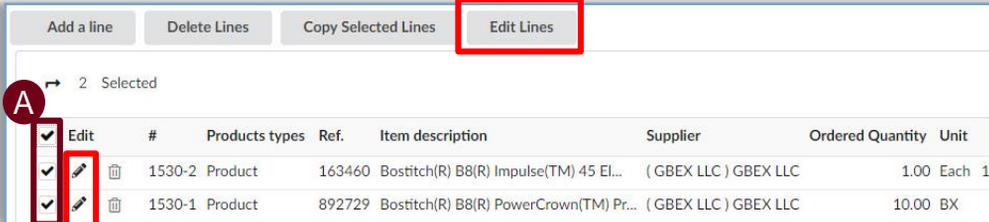
10 ▲ If you need to add an attachment to the purchase requisition, consider the following information regarding the types of attachments:

- **Internal Attachment:** Documentation, visible to State users, kept with the purchase requisition (e.g., internal emails, Supplier quotes) helpful for future reference or approvals.
- **Justification Document:** Documentation required when ordering an item on the restricted commodity list. The restricted commodity list is a list of commodities identified by the requisite procurement programs as goods/services that require their review before they can be purchased from a Supplier that isn't a requisite procurement program.
- **Supplier Document:** Documentation sent to the Supplier with the purchase order.

At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil (✎)** icon next to each line item to make your mandatory and/or optional additions to specific fields (e.g., Supplier contact, ordered quantity, chartfield information, etc.).

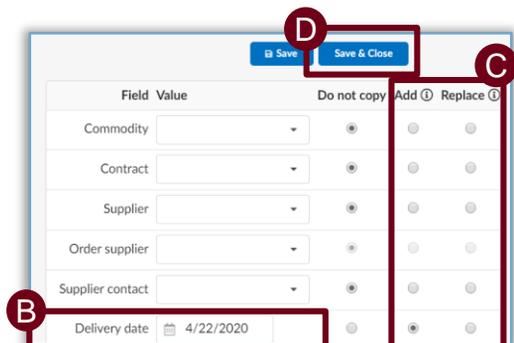
▲ If you want to edit multiple line items at one time (e.g., mass select a delivery date), complete the following:

- Click the **Individual Checkbox Icon** next to the individual line items to select multiple individual line items or click the **Select All Checkbox Icon** above the line items to mass edit all the line items and click the **Edit Lines** button.



		Add a line	Delete Lines	Copy Selected Lines	Edit Lines					
2 Selected										
<input type="checkbox"/>	<input type="checkbox"/>	#	Products types	Ref.	Item description	Supplier	Ordered Quantity	Unit		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1530-2	Product	163460	Bostitch(R) B8(R) Impulse(TM) 45 El...	(GBEX LLC) GBEX LLC	1.00	Each	1	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1530-1	Product	892729	Bostitch(R) B8(R) PowerCrown(TM) Pr...	(GBEX LLC) GBEX LLC	10.00	BX		

- To update the **Delivery Date**, select it from the **Delivery Date** field.
- Click the **Add** radio button or **Replace** radio button for each of the fields you updated. Note that **Add** will add a value in a blank field only, whereas **Replace** will replace the current value with the new one selected.
- Click the **Save & Close** button.



Field	Value	Do not copy	Add <input type="radio"/>	Replace <input type="radio"/>
Commodity	<input type="text"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
Contract	<input type="text"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
Supplier	<input type="text"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
Order supplier	<input type="text"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
Supplier contact	<input type="text"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
Delivery date	<input type="text" value="4/22/2020"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

To update the Order Supplier and Supplier Contact fields for multiple line items:

- 1) Click the **Pencil** (✎) icon next to one of the items to open it.

Edit	#	Products types	Ref.	Item description	Supplier
<input type="checkbox"/> ✎	9198-3	Product		Glass Filament, 1/2 in., 72 rolls p...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input type="checkbox"/> 🗑️	9198-2	Product		Glass Filament, 48mm, 24 rolls per ...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input type="checkbox"/> ✎ 🗑️ ⚠️	9198-1	Product		Class 2 Asphalt Safety Vest, S-3X, ...	(GOODWILL INDUSTRIES OF AKRON OHIO INC) GOODWILL INDUSTRIES C

- 2) Select the Order Supplier and Supplier Contact.

Select Supplier

Supplier

CINCINNATI ASSOCIATION FOR THE BLIND

Order Supplier ⓘ

Supplier Contact

- 3) Click **Save**. You must save the Order Supplier and Supplier contact before applying the change to all line items in the order.



- 4) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier and Supplier Contact for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.

Apply Order Supplier/Contact To All Line Items

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

When reviewing the line item details for an individual line item, you can update information in the following sections:

- a) **Describe the Item:** You are able to update the **Ordered Quantity** and **Delivery Date** fields as needed.
- b) **Select Supplier:** In some scenarios, you can select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. You should also update the Supplier Location field according to the information that Supplier has listed in OAKS.

A Describe the item

ID: 6215

Name: Masking Tape, Premium, 1/2": 72 rolls per case

Ordered Quantity: 1.00 Case

Commodity: 31201503 - Masking tape Pro MBE Set Aside M

Products types: Product MBE Set Aside

Delivery Date: 10/30/2019

B Select Supplier

Supplier: Capital Door Solutions Inc

Order Supplier: Capital Door Solutions Inc

Supplier Contact: DAHMAN JENNIFER

Supplier Location: EFT-1

Use Non-Default Supplier Location:

Dealers Available:

Controlling Board Number:

12

- c) **Pricing:** You are able to adjust the price for hosted and punchout catalog items, as needed. Whenever you adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document. The price can also be adjusted after conducting a quick quote within Ohio|Buys. Please refer to the [Create and Release a Quick Quote Solicitation](#) Job Aid for instructions on how to conduct a quick quote.
- d) **Define Delivery Place:** If desired, you can define a different delivery place for each item.

C Pricing

137.790 USD

Total Amount: 137.790

Supplier Quote ID

D Define delivery place

Ship to: DRC OPI MODULAR INST WAREHOUSE 5350 FISHER ROAD Columbus

DRC OPI MODULAR INST WAREHOUSE
5350 FISHER ROAD
43228 Columbus
Ohio
UNITED STATES

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

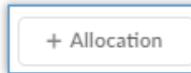
e) Budget Information: Expand this section to add chartfield information for the line item.

The information entered in this section is the same information that was previously provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information. Chartfield information locks after the Fiscal Approver completes their review.

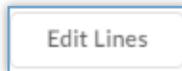
The screenshot shows a 'Budget Information' form with a 'Filled In' section containing radio buttons for 'Percentage' (selected) and 'Amount', and a 'To be allocated' field with '0.000 %'. Below is a table of chartfield fields:

Fund	Account	ALI	Department	Program	Grant/Project	Project	Service Location	Report	Agency Use	ISTV Xref	Site
<input type="checkbox"/> GRF - GENERAL REVENUE	521050 - OFFICE SUPPLY & EQ (NOT)	001699 - INVESTMENT EARNINGS		1001C - INTEREST LIABILITY PAYMENT							ADJ111000 Executive BEAR

When adding chartfield information, users can click + Allocation to add an additional chartfield string.



Users can update fields in multiple chartfield strings at once by clicking the Checkbox Icon () next to the strings they want to update and then clicking Edit Lines.



This opens the Allocation Mass Update page where users can apply chartfields to all selected lines.

The screenshot shows the 'Allocation Line Mass Update' form with the following fields:

- Fund:
- Account:
- ALI:
- Department:
- Program:
- Grant/Project:
- Project:

Buttons: Save, Save & Close

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

13

Once you are done making updates to the line item's information, click **Save & Close**.

Save & Close

14

Continue making updates to any remaining line items using Steps 12-13. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit requisition**.

Submit requisition

- ▲ In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies. Please refer to the **Quick Quotes Learner Guide** for details on the Quick Quote process.

After your requisition has been submitted for review, you can check its approval status at any time.

- ▲ If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.
- ▲ To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

15

Workflow Main Approvals							
Approval Type	Approved By	Purchase Requisition	Agency	Label	Approval Date	Approved	Performer
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal		<input type="checkbox"/>	STEELE BRANDON
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal		<input type="checkbox"/>	FiscalAgencyApprover1 SIT
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval		<input type="checkbox"/>	STEELE BRANDON
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval		<input type="checkbox"/>	Final Agency Approver 1 SIT

4 Result(s)

- ▲ On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.
- ▲ You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

SUBMIT A PUNCHOUT CATALOG PURCHASE REQUISITION

Overview

- What's Covered: This section discusses the process for creating and submitting a purchase requisition for items from a punchout catalog
- Roles: Requesters, Requisitioners
- Used When: Creating a purchase requisition from a Supplier who uses a punchout catalog

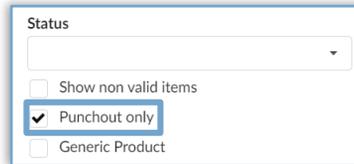
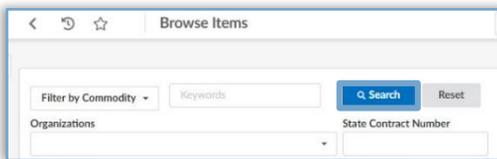
Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

1

Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

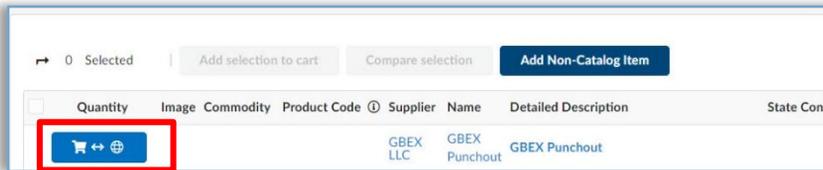
2

The Browse Items page is displayed. To quickly find a Supplier's punchout catalog, enter and select name of the Supplier in the **Keywords** or **Supplier** field and click **Search**. By default, the search results on the Browse Items page are filtered to only show items that contain an item tag. An item tag indicates if an item is tied to a Mandatory First Requisite, Mandatory Second Requisite, or Mandatory DAS Contract. In order to search for items that do not have any tags, you must remove the item tag filters from your search terms. To view only punchout catalogs, Click the **More Filters** () icon and select the **Punchout only** checkbox.



3

Punchout catalog items will show a **Shop Online** icon in the Quantity column instead of an **Add to Cart** button. Click the **Shop Online** icon to view the Supplier's punchout catalog.



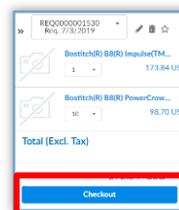
▲ Hosted and punchout catalog items' prices may change as updates are reviewed and approved by Contract Analysts. Punchout catalog item pricing may change at any time without approval of a Contract Analyst unless the item is a Market Basket Item. Market Basket Items are listed in a contract's terms and maintain firm pricing for one year from the contract's inception.

4

The Supplier's punchout catalog is displayed. Search for and add the item(s) you would like to purchase. In order to punch back into Ohio|Buys and transfer your shopping cart over, click **Check Out** or **Submit Order** (the wording of the button will vary depending on the Supplier) on the Supplier's website. After you submit an order, a notification will typically display thanking you for visiting the Supplier's website. The notification will inform you that your items will be transferred back to Ohio|Buys.

5

The items from the Supplier's punchout catalog have been added to your shopping cart. To begin the checkout process, select the shopping cart () icon to expand the item management window pane and click **Checkout**.



Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

- 6
- Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is "Office Supplies JD").
 - Select your **Organization**, which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.
 - Indicate if you would like receiving to be required in Ohio|Buys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in Ohio|Buys in order for any Supplier submitted invoices to be processed.
 - Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '+' icon to provide a one-time delivery address.
 - ▲ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.
 - ▲ If you have the Requisitioner (On Behalf Of) role, you are able to update the **Requester** field if the purchase requisition is being created for another user.
 - If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).
 - Click **Save**.

Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

If you would like to make this purchase a Pcard purchase, change the requisition **Type** by selecting **Pcard Purchase** from the drop-down menu, then click **Save**.

For more information on completing a Pcard purchase, please refer to [Submit a Pcard Purchase Requisition](#).



- Select the **Origin Code** based on the agency you're purchasing for. (Not required until the Fiscal Approver step, however Requisitioners can fill it out if they know it)
- Select the **Budget Date**. By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. The relevant fiscal year will populate in the **Fiscal Year** field, .
- Expand the **Purchasing Options** section. From this section, you can indicate if a **DAS sourcing event** is required, as well as if the purchase requisition is **Single Source** or **Sole Source**. In addition, you can also note if the purchase requisition should be put on hold, and/or if it should not be encumbered.
- Use the displayed radio buttons to make your selections. If you select that a **DAS sourcing event** is required, click the **Request DAS to Source** button to complete the associated request form, which will then be routed to DAS. Please refer to the [Submit a Solicitation Request](#) Job Aid for step-by-step instructions on how to complete this request form.

7

On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level. Information input in the Comments to Supplier field will be visible to Suppliers on the printed purchase order, however information in the Request Description field will not be.

8

Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

9 Click the **Save** button.



10

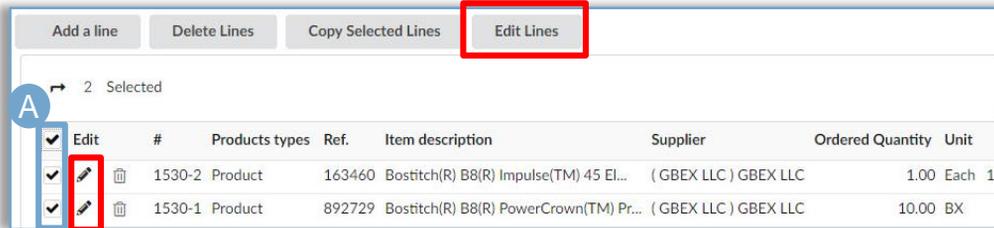
▲ If you need to add an attachment to the purchase requisition, consider the following information regarding the types of attachments:

- **Internal Attachment:** Documentation, visible to State users, kept with the purchase requisition (e.g., internal emails, Supplier quotes) helpful for future reference or approvals.
- **Justification Document:** Documentation required when ordering an item on the restricted commodity list. The restricted commodity list is a list of commodities identified by the requisite procurement programs as goods/services that require their review before they can be purchased from a Supplier that isn't a requisite procurement program.
- **Supplier Document:** Documentation sent to the Supplier with the purchase order.

At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil (✎)** icon next to each line item to make your mandatory and/or optional additions to specific fields (e.g., Supplier contact, ordered quantity, chartfield information, etc.).

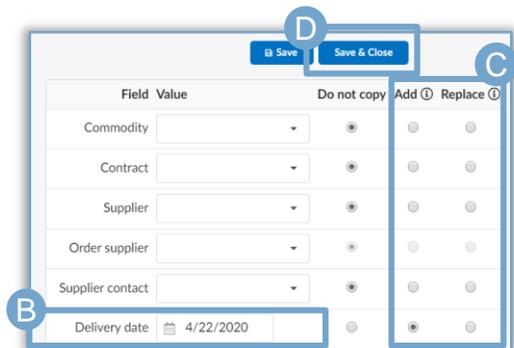
▲ If you want to edit multiple line items at one time (e.g., mass select a delivery date), complete the following:

- Click the **Individual Checkbox Icon** next to the individual line items to select multiple individual line items or click the **Select All Checkbox Icon** above the line items to mass edit all the line items and click the **Edit Lines** button.



11

- To update the **Delivery Date**, select it from the **Delivery Date** field.
- Click the **Add** radio button or **Replace** radio button for each of the fields you updated. Note that **Add** will add a value in a blank field only, whereas **Replace** will replace the current value with the new one selected.
- Click the **Save & Close** button.



Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

To update the Order Supplier and Supplier Contact fields for multiple line items:

- 1) Click the **Pencil** (✎) icon next to one of the items to open it.

Edit	#	Products types	Ref.	Item description	Supplier
<input type="checkbox"/> ✎	9198-3	Product		Glass Filament, 1/2 in., 72 rolls p...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input type="checkbox"/> 🗑	9198-2	Product		Glass Filament, 48mm, 24 rolls per ...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input type="checkbox"/> ✎ 🚩	9198-1	Product		Class 2 Asphalt Safety Vest, S-3X, ...	(GOODWILL INDUSTRIES OF AKRON OHIO INC) GOODWILL INDUSTRIES OF AKRON OHIO INC

- 2) Select the Order Supplier and Supplier Contact.

Select Supplier

Supplier

CINCINNATI ASSOCIATION FOR THE BLIND

Order Supplier ⓘ

Supplier Contact

- 3) Click **Save**. You must save the Order Supplier and Supplier contact before applying the change to all line items in the order.



- 4) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier and Supplier Contact for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.

Apply Order Supplier/Contact To All Line Items

Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

When reviewing the line item details for an individual line item, you can update information in the following sections:

- a) **Describe the Item:** You are able to update the **Ordered Quantity** and **Delivery Date** fields as needed.
- b) **Select Supplier:** In some scenarios, you can select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. You should also update the Supplier Location field according to the information that Supplier has listed in OAKS.

A Describe the item

ID: 6215

Name: Masking Tape, Premium, 1/2": 72 rolls per case

Ordered Quantity: 1.00 Case

Commodity: 31201503 - Masking tape Pro MBE Set Aside M

Products types: Product MBE Set Aside

Delivery Date: 10/30/2019

B Select Supplier

Supplier: Capital Door Solutions Inc

Order Supplier: Capital Door Solutions Inc

Supplier Contact: DAHMAN JENNIFER

Supplier Location: EFT-1

Use Non-Default Supplier Location:

Dealers Available:

Controlling Board Number: [dropdown]

12

- c) **Pricing:** You are able to adjust the price for hosted and punchout catalog items, as needed. Whenever you adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document. The price can also be adjusted after conducting a quick quote within OhioBuys. Please refer to the [Create and Release a Quick Quote Solicitation](#) Job Aid for instructions on how to conduct a quick quote.
- d) **Define Delivery Place:** If desired, you can define a different delivery place for each item.

C Pricing

137.790 USD

Total Amount: 137.790

Supplier Quote ID: [input field]

D Define delivery place

Ship to: DRC OPI MODULAR INST WAREHOUSE 5350 FISHER ROAD Columbus

DRC OPI MODULAR INST WAREHOUSE
5350 FISHER ROAD
43228 Columbus
Ohio
UNITED STATES

Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

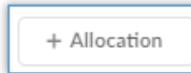
e) **Budget Information:** Expand this section to add chartfield information for the line item.

▲ The information entered in this section is the same information that was previously provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information. Chartfield information locks after the Fiscal Approver completes their review.

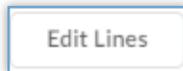
The screenshot shows a 'Budget Information' form with a 'Filled In' section containing radio buttons for 'Percentage' (selected) and 'Amount', and a 'To be allocated' field with '0.000 %'. Below is a table of chartfield fields:

Fund	Account	ALI	Department	Program	Grant/Project	Project	Service Location	Report	Agency Use	ISTV Xref	Site
<input type="checkbox"/> GRF - GENERAL REVENUE	521050 - OFFICE SUPPLY & EQ (NOT)	001699 - INVESTMENT EARNINGS		1001C - INTEREST LIABILITY PAYMENT							ADJ111000 Executive BEAR

▲ When adding chartfield information, users can click **+ Allocation** to add an additional chartfield string.



▲ Users can update fields in multiple chartfield strings at once by clicking the **Checkbox Icon** () next to the strings they want to update and then clicking **Edit Lines**.



This opens the Allocation Mass Update page where users can apply chartfields to all selected lines.

The screenshot shows the 'Allocation Line Mass Update' form with the following fields:

- Fund:
- Account:
- ALI:
- Department:
- Program:
- Grant/Project:
- Project:

Buttons: Save, Save & Close

Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

13

Once you are done making updates to the line item's information, click the **Save & Close** button.

Save & Close

14

Continue making updates to any remaining line items using Steps 12-13. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit requisition**.

Submit requisition

▲ In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies. Please refer to the **Quick Quotes Learner Guide** for details on the Quick Quote process.

After your requisition has been submitted for review, you can check its approval status at any time.

- ▲ If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.
- ▲ To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

15

Workflow Main Approvals							
Approval Type	Approved By	Purchase Requisition	Agency	Label	Approval Date	Approved	Performer
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal		<input type="checkbox"/>	STEELE BRANDON
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal		<input type="checkbox"/>	FiscalAgencyApprover1 SIT
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval		<input type="checkbox"/>	STEELE BRANDON
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval		<input type="checkbox"/>	Final Agency Approver 1 SIT

4 Result(s)

- ▲ On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.
- ▲ You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

SUBMIT A FREEFORM PURCHASE REQUISITION

Overview

- What's Covered: This section discusses the process for creating and submitting a purchase requisition containing freeform items – items that are made by the user and not contained in any hosted or punchout catalog – formerly known as a Special Request purchase requisition in OAKS
- Roles: Requesters, Requisitioners
- Used When: Creating a purchase requisition for an item that is not available from a hosted or punchout catalog

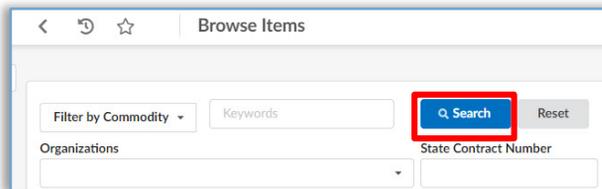
Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

1

Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

2

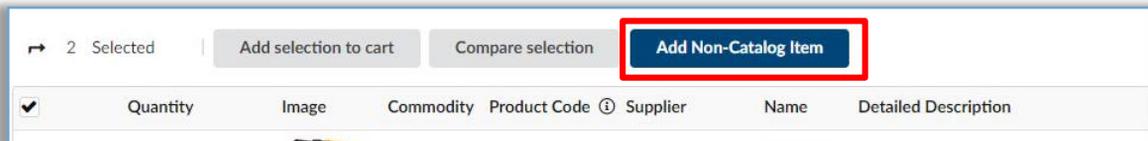
The Browse Items page is displayed. On this page, you can enter a variety of search terms to search for goods and services in Ohio|Buys. For example, you can easily search by Keywords and State Contract Numbers. Enter search terms and then click **Search**. By default, the search results on the Browse Items page are filtered to only show items that contain an item tag. An item tag indicates if an item is tied to a Mandatory First Requisite, Mandatory Second Requisite, or Mandatory DAS Contract. In addition, item tags also indicate if an item has Dealers or is linked to an MBE Set-Aside contract. In order to search for items that do not have any tags, you must remove the item tag filters from your search terms.



The screenshot shows the 'Browse Items' search interface. It includes a search bar with a 'Keywords' input field, a 'Search' button (highlighted with a red box), and a 'Reset' button. Below the search bar, there are dropdown menus for 'Filter by Commodity', 'Organizations', and 'State Contract Number'.

3

If you are unable to find what you are looking for in Ohio|Buys, you can create a freeform line item. Click **Add Non-Catalog Item**.



The screenshot shows the shopping cart interface. It includes a '2 Selected' indicator, 'Add selection to cart', 'Compare selection', and 'Add Non-Catalog Item' buttons (the latter is highlighted with a red box). Below the buttons is a table with columns for 'Quantity', 'Image', 'Commodity', 'Product Code', 'Supplier', 'Name', and 'Detailed Description'.

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

Complete the following fields in the **Describe the Item** section:

- a) Enter the **Name** of the good or service you would like to request. The Name should be a short description of the good or service.
- b) Enter the **Ordered Quantity** and adjust the **Unit of Measure** as needed.
 - ▲ If you plan to encumber to OAKS and enter receipts against the PO, then you must use a Unit of Measure other than "AMT".
- c) Enter and select the associated **Commodity**. You should select the most applicable commodity code as possible.
 - ▲ If you are having trouble finding the correct commodity in Ohio|Buys, you can also visit the UNSPSC website (<https://www.unspsc.org/search-code>) to search for a commodity.
 - ▲ Note that if a commodity code you wish to select is not currently in Ohio|Buys, you will need to submit a help desk ticket in order for it to be added.
- d) If this purchase is supposed to be an MBE Set Aside or EDGE purchase, select using the **MBE Drop-Down** menu. This selection will be visible on in OAKS.
 - M indicates the item is an MBE item
 - E indicates the item is an EDGE item
 - N indicates the item is neither MBE, nor EDGE
- e) Select the **Delivery Date** (or date range for Services).

4

The screenshot shows the 'Describe the item' form with the following fields and callouts:

- A**: ID field (empty)
- B**: Name field (Custom Open-Back Paper Table Cloth - 8", Color)
- C**: Ordered Quantity * field (5) and Unit of Measure dropdown (Each)
- D**: Commodity dropdown (14111706 - Paper table cloth) and Profile ID dropdown (empty)
- E**: Products types * dropdown (Product) and MBE Set Aside dropdown (M)
- Delivery Date * field (7/12/2019)

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

Complete the following fields in the **Select Supplier** section:

- If you know the Supplier that should supply this item, enter or select their name in the **Supplier** and **Order Supplier** fields. The **Order Supplier** is typically the location of the Supplier office that will fulfill the order. Please note, only Suppliers who are registered in Ohio|Buys can be selected in these fields.
- Select the applicable **Supplier Contact**, though not required.
- Select the **Supplier Location** according to the Supplier's preferences in OKAS. After saving the Order Supplier, this field will automatically populate with the Supplier's default Location in OAKS. To use an alternative Location, you must click the **Use Non-default Supplier Location** slider.

Enter the **Cost** for the item in the **Pricing** section.

Expand the **More Item Information** section and then:

- Enter a detailed description of why you are requesting a freeform item in the **Internal Comments** field.
 - Enter any comments for the Supplier in the **Comment** field as needed and attach any Supplier facing documents using the **Attachments** button.
 - Click **Save & Close**.
- ▲ Comments and attachments can be added at the line item level as well as the header level.

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

The screenshot shows the 'Requisition: REQ0073 - Req. 6/8/2020 (Draft)' page. The interface includes a top navigation bar with buttons for 'Save', 'Submit requisition', 'Back to Catalog', 'Reset Allocations', 'Create Quick Quote', and 'Other Actions'. A left sidebar contains navigation options like 'Purchase Requisition', 'Term', 'Controlling Board', 'Release & Permit', 'Requisite Program', and 'Workflow'. The main form area is divided into sections: 'Header', 'Request Description', and 'Comments to Supplier'. The 'Header' section contains fields for Requisition ID (4273), Status (Draft), Type (Standard Purchase), Requisition Label (Req. 6/8/2020), Requester (Kaizer Mike), Organization, Business Unit, Fiscal Year, and Budget Date (6/8/2020). A 'Receiving Required?' dropdown is also present. The 'Request Description' section has a 'Ship to' field with a '+' icon, an 'Attn' field, and a 'Bill To' field. The 'Comments to Supplier' section is empty. Callouts A-F highlight the following fields: A (Requisition Label), B (Organization), C (Receiving Required?), D (Ship to), E (Additional Agency Approvers), and F (Save button).

- 8
- Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is "Office Supplies JD").
 - Select your **Organization**, which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.
 - Indicate if you would like receiving to be required in Ohio|Buys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in Ohio|Buys in order for any Supplier submitted invoices to be processed.
 - Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '+' icon to provide a one-time delivery address.
 - ▲ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.
 - ▲ If you have the Requisitioner (On Behalf Of) role, you are able to update the **Requester** field if the purchase requisition is being created for another user.
 - If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).
 - Click **Save**.

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

If you would like to make this purchase a Pcard purchase, change the requisition **Type** by selecting **Pcard Purchase** from the drop-down menu, then click **Save**.

For more information on completing a Pcard purchase, please refer to [Submit a Pcard Purchase Requisition](#).

- a) Select the **Origin Code** based on the agency you're purchasing for. (Not required until the Fiscal Approver step, however Requisitioners can fill it out if they know it)
- b) Select the **Budget Date**. By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. The relevant fiscal year will populate in the **Fiscal Year** field, .
- c) Expand the **Purchasing Options** section. From this section, you can indicate if a **DAS sourcing event** is required, as well as if the purchase requisition is **Single Source** or **Sole Source**. In addition, you can also note if the purchase requisition should be put on hold, and/or if it should not be encumbered.
- d) Use the displayed radio buttons to make your selections. If you select that a **DAS sourcing event** is required, click the **Request DAS to Source** button to complete the associated request form, which will then be routed to DAS. Please refer to the [Submit a Solicitation Request](#) Job Aid for step-by-step instructions on how to complete this request form.

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On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level. Information input in the Comments to Supplier field will be visible to Suppliers on the printed purchase order, however information in the Request Description field will not be.

10

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

11 Click the **Save** button.



▲ If you need to add an attachment to the purchase requisition, consider the following information regarding the types of attachments:

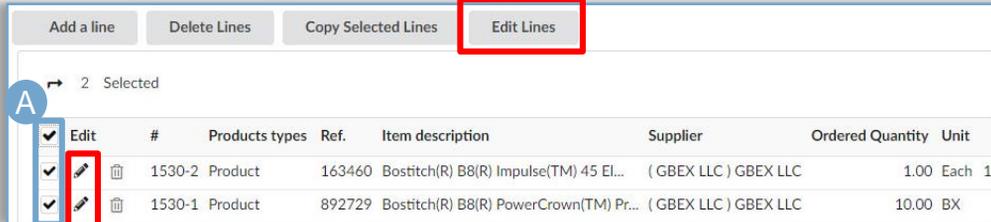
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- **Internal Attachment:** Documentation, visible to State users, kept with the purchase requisition (e.g., internal emails, Supplier quotes) helpful for future reference or approvals.
- **Justification Document:** Documentation required when ordering an item on the restricted commodity list. The restricted commodity list is a list of commodities identified by the requisite procurement programs as goods/services that require their review before they can be purchased from a Supplier that isn't a requisite procurement program.
- **Supplier Document:** Documentation sent to the Supplier with the purchase order.

At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil (✎)** icon next to each line item to make your mandatory and/or optional additions to specific fields (e.g., Supplier contact, ordered quantity, chartfield information, etc.).

▲ If you want to edit multiple line items at one time (e.g., mass add a Supplier contact to multiple line items at once), complete the following:

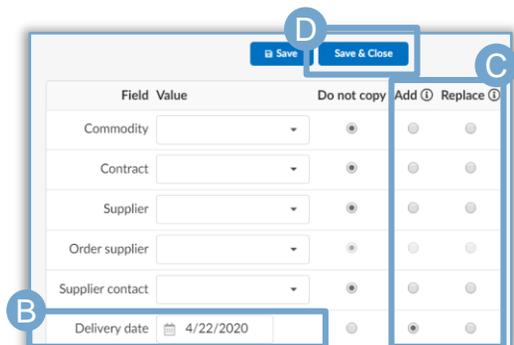
- Click the **Individual Checkbox Icon** next to the individual line items to select multiple individual line items or click the **Select All Checkbox Icon** above the line items to mass edit all the line items and click the **Edit Lines** button.



		Add a line	Delete Lines	Copy Selected Lines	Edit Lines				
A		2 Selected							
<input type="checkbox"/>	Edit	#	Products types	Ref.	Item description	Supplier	Ordered Quantity	Unit	
<input checked="" type="checkbox"/>		1530-2	Product	163460	Bostitch(R) B8(R) Impulse(TM) 45 El...	(GBEX LLC) GBEX LLC	1.00	Each	1
<input checked="" type="checkbox"/>		1530-1	Product	892729	Bostitch(R) B8(R) PowerCrown(TM) Pr...	(GBEX LLC) GBEX LLC	10.00	BX	

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- To update the **Delivery Date**, select it from the **Delivery Date** field.
- Click the **Add** radio button or **Replace** radio button for each of the fields you updated. Note that **Add** will add a value in a blank field only, whereas **Replace** will replace the current value with the new one selected.
- Click the **Save & Close** button.



Field	Value	Do not copy	Add	Replace
Commodity		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contract		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supplier		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Order supplier		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supplier contact		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery date	4/22/2020	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

To update the Order Supplier and Supplier Contact fields for multiple line items:

- 1) Click the **Pencil** (✎) icon next to one of the items to open it.

Edit	#	Products types	Ref.	Item description	Supplier
<input type="checkbox"/> ✎	9198-3	Product		Glass Filament, 1/2 in., 72 rolls p...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input type="checkbox"/> ✎	9198-2	Product		Glass Filament, 48mm, 24 rolls per ...	(CINCINNATI ASSOCIATION FOR THE BLIND)
<input type="checkbox"/> ✎	9198-1	Product		Class 2 Asphalt Safety Vest, S-3X, ...	(GOODWILL INDUSTRIES OF AKRON OHIO INC) GOODWILL INDUSTRIES C

- 2) Select the Order Supplier and Supplier Contact.

Select Supplier

Supplier
CINCINNATI ASSOCIATION FOR THE BLIND

Order Supplier ⓘ

Supplier Contact

- 3) Click **Save**. You must save the Order Supplier and Supplier contact before applying the change to all line items in the order.



- 4) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier and Supplier Contact for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.

Apply Order Supplier/Contact To All Line Items

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

When reviewing the line item details for an individual line item, you can update information in the following sections:

- a) **Describe the Item:** You are able to update the **Ordered Quantity** and **Delivery Date** fields as needed.
- b) **Select Supplier:** In some scenarios, you can select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. You should also update the Supplier Location field according to the information that Supplier has listed in OAKS.

A Describe the item

The 'Describe the item' form includes the following fields and options:

- ID:** 6215
- Name:** Masking Tape, Premium, 1/2" 72 rolls per case
- Ordered Quantity:** 1.00 (with a 'Case' dropdown menu)
- Commodity:** 31201503 - Masking tape (with a 'Pro MBE Set Aside' dropdown menu set to 'M')
- Products types:** Product (with an 'MBE Set Aside' toggle switch turned on)
- Delivery Date:** 10/30/2019

B Select Supplier

The 'Select Supplier' form includes the following fields and options:

- Supplier:** Capital Door Solutions Inc
- Order Supplier:** Capital Door Solutions Inc
- Supplier Contact:** DAHMAN JENNIFER
- Supplier Location:** EFT-1
- Use Non-Default Supplier Location:** (toggle switch)
- Dealers Available:** (toggle switch)
- Controlling Board Number:** (dropdown menu)

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- c) **Pricing:** You are able to adjust the price for hosted and punchout catalog items, as needed. Whenever you adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document. The price can also be adjusted after conducting a quick quote within OhioBuys. Please refer to the [Create and Release a Quick Quote Solicitation](#) Job Aid for instructions on how to conduct a quick quote.
- d) **Define Delivery Place:** If desired, you can define a different delivery place for each item.

C Pricing

The 'Pricing' form includes the following fields:

- Price:** 137.790 (with a 'USD' dropdown menu)
- Total Amount:** 137.790
- Supplier Quote ID:** (with an information icon)

D Define delivery place

The 'Define delivery place' form includes the following field:

- Ship to:** DRC OPI MODULAR INST WAREHOUSE 5350 FISHER ROAD Columbus

Additional address details shown below the dropdown:

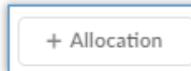
- DRC OPI MODULAR INST WAREHOUSE
- 5350 FISHER ROAD
- 43228 Columbus
- Ohio
- UNITED STATES

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

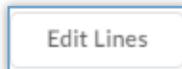
e) **Budget Information:** Expand this section to add chartfield information for the line item.

▲ The information entered in this section is the same information that was previously provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information. Chartfield information locks after the Fiscal Approver completes their review.

▲ When adding chartfield information, users can click **+ Allocation** to add an additional chartfield string.



▲ Users can update fields in multiple chartfield strings at once by clicking the **Checkbox Icon** () next to the strings they want to update and then clicking **Edit Lines**.



This opens the Allocation Mass Update page where users can apply chartfields to all selected lines.

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

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Once you have finished making updates to the line item's information, click the **Save & Close** button.



16

Continue making updates to any remaining line items using Step 15-16. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit requisition**.



- ▲ In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies. Please refer to the **Quick Quotes Learner Guide** for details on the Quick Quote process.

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After your requisition has been submitted for review, you can check its approval status at any time.

- ▲ If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.
- ▲ To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

Workflow Main Approvals							
Approval Type	Approved By	Purchase Requisition	Agency	Label	Approval Date	Approved	Performer
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal		<input type="checkbox"/>	STEELE BRANDON
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal		<input type="checkbox"/>	FiscalAgencyApprover1 SIT
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval		<input type="checkbox"/>	STEELE BRANDON
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval		<input type="checkbox"/>	Final Agency Approver 1 SIT

4 Result(s)

- ▲ On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.
- ▲ You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

APPROVING PURCHASE REQUISITIONS

Topics

- Review and Update a Purchase Requisition (Requisitioners)
- Approve a Purchase Requisition (Requester Supervisor)
- Approve a Purchase Requisition (Agency Procurement Approver)
- Approve a Purchase Requisition (Agency Fiscal Approver)
- Approve a Purchase Requisition (Agency Final Approver)

REVIEW AND UPDATE A PURCHASE REQUISITION

Overview

- What's Covered: This section discusses the process of reviewing and updating a purchase requisition that has been submitted by a Requester
- Roles: Requisitioners
- Used When: Updating a purchase requisition that has been submitted by a Requester

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

▲ 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.

1

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 the 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.

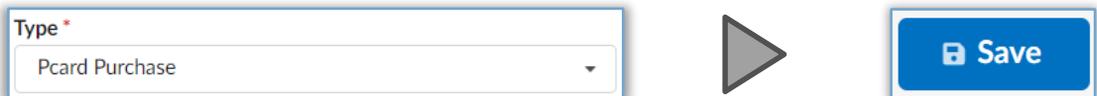
3

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

▲ If a user updates the **Organization** field on the header of a purchase requisition, they must click **Save** and then click **Cancel** on the subsequent popup window that is displayed.

4

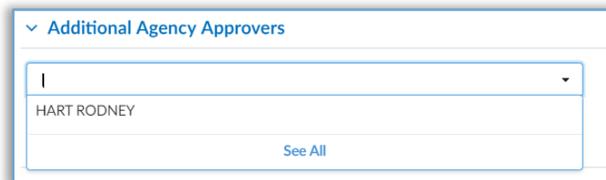
If the purchase requisition should be a Pcard purchase, you can apply your Pcard by updating the **Type** to Pcard Purchase and clicking **Save**.



The screenshot shows a form field labeled "Type *" with a dropdown menu. The dropdown menu is open, showing "Pcard Purchase" as the selected option. To the right of the dropdown menu is a grey right-pointing triangle. To the right of the triangle is a blue button with a white lock icon and the text "Save".

5

If required, select any Additional Agency Approvers who will need to review the purchase requisition.



The screenshot shows a dropdown menu titled "Additional Agency Approvers". The dropdown menu is open, showing a list of names. The name "HART RODNEY" is selected and highlighted. Below the list is a "See All" link.

▲ Note that only one of the selected Approvers needs to approve the purchase requisition for it to advance to a purchase order.

▲ If you are unsure who these approvers should be, please consult with your Agency Admin.

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

- 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:

- > Organization Structure
- > Purchasing Options
- > Attachments - Internal, Supplier, and Justification
- > Workflow Main Approvals

6

- Organization Structure section: View organization-related information regarding the purchase requisition
- 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, if it should not be encumbered, or if it is related to sudden and accidental direct physical damage to property. 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

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

- a) Scroll down to the Items box to view the line item(s) associated with the purchase requisition.

<input type="checkbox"/> Edit	#	Products types	Ref.	Item description	Supplier	Ordered Quantity	Unit	Price	Total
<input type="checkbox"/>	3344-1	Product		Power Drills		3.00	Each		

- 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.

7

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

7

- 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. In the Items box, the line item information updates to the line item information you have chosen.

<input type="checkbox"/> Edit	#	Products types	Ref.	Item description	Supplier
<input type="checkbox"/>	3344-1	Product		DEWALT 9.6 VOLT CORDLESS DRILL (SUPPLYWORKS) SUPPLYWOR	

8

- 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.

[> Release & Permit](#)

[> More Item Information](#)

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

Filled In Percentage Amount To be allocated 0.000 %

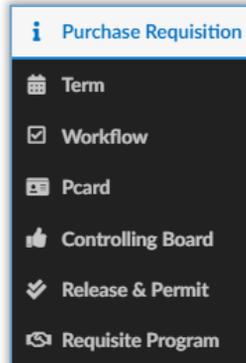
+ Allocation

% Pretax Amount (USD)	Organization	Fund	Account	ALI	Department	Program
100.00 %	413.37 DRC-Dept of Rehab & Corrections		536151 - POWER TOOLS			

- d) Once you have validated or updated the item’s information as necessary, click **Save & Close**.

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

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:



9

- 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 (only visible if the purchase type is Pcard Purchase)
- 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

10

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.

APPROVE A PURCHASE REQUISITION (REQUESTER SUPERVISOR)

Overview

- What's Covered: This section discusses the process by which a Requester's Supervisor reviews and approves a purchase requisition submitted by their staff
- Roles: Requester Supervisors
- Use When: A user receives a notification that their approval is required for one of their direct reports' purchase requisitions

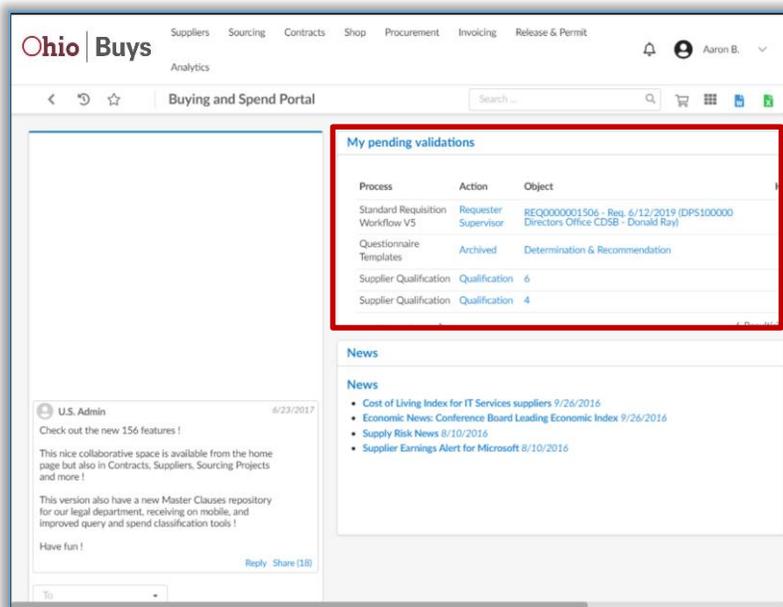
Step-by-Step Instructions for Approving a Purchase Requisition



In the event that a Requester with no designated Requester Supervisor submits a requisition, an email notification will be sent to that Requester's Agency Admin. That Agency Admin can then follow the procedure outlined below to advance the Requester's requisition.

1

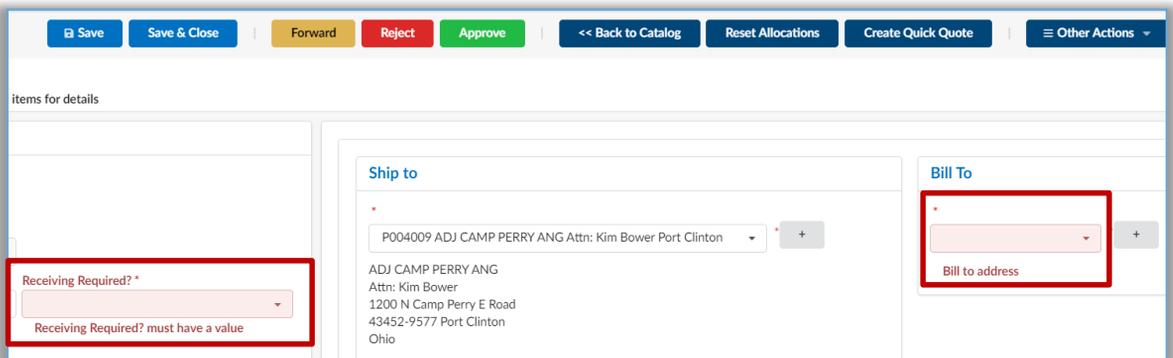
Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of Requester Supervisor to quickly view and take action on any purchase requisition needing your approval. Once you have found the task you would like to open, click on the **Object** name.



2

Review the information contained in the purchase requisition.

▲ You may need to complete the mandatory **Receiving Required?** and **Bill To** address fields. Select Yes or No for **Receiving Required?** to indicate if receiving will be completed in Ohio|Buys. By default, this field will auto-populate as **No**. Enter and select a value in the **Bill To** address field.

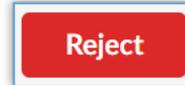


Step-by-Step Instructions for Approving a Purchase Requisition

If the purchase requisition is justified, click the **Approve** button to approve it and send it to a requisitioner for completion.

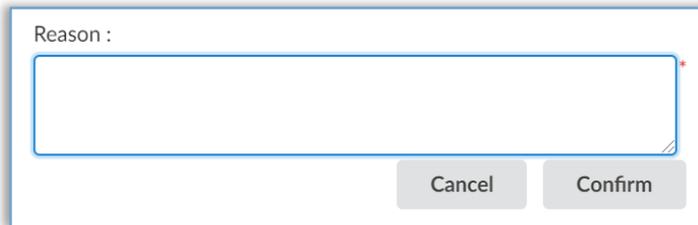


If the Requester's purchase requisition is not justified, click **Reject**. This sends the request back to the initial requester for revisions, as needed.



3

▲ If you reject a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. This will be sent along with the purchase requisition back to the Requester.

A pop-up comment box with a title "Reason :". It contains a large text input field with a red asterisk on the right side. Below the input field are two buttons: "Cancel" and "Confirm".

APPROVE A PURCHASE REQUISITION (ADDITIONAL AGENCY APPROVER)

Overview

- What's Covered: This section discusses the process of reviewing, updating, and approving or rejecting a purchase requisition as an Additional Agency Approver
- Roles: Additional Agency Approvers
- Used When: A user receives a notification that a purchase requisition requires their review

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 the 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 Agency Final Approver 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.

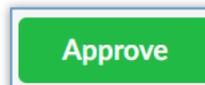
The screenshot shows the Ohio|Buys Requisitioner dashboard. The 'My pending validations' section is highlighted with a red box. It contains a table with the following data:

Workflow	Activity	Object	Due date	History
Standard Requisition Workflow	Additional Agency Approver	REQ0000004200 - Req. 5/27/2020 (ADJ111000 Executive BEAR - Kaiser Mike)		
Standard Requisition Workflow	Additional Agency Approver	REQ0000004164 - Copy of Copy of Summer Test (ADJ111000 Executive BEAR - Zhang Summer)		
		REQ0000004157 -		

On the right side of the dashboard, there are four circular statistics: 0 Current FY PO's, 46 Requisitions, +150 My Sourcing Projects, and +150 Release & Permit.

1

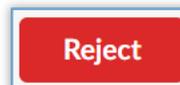
Review the information contained in the purchase requisition. If the requisition is justified and the details are satisfactory, click the **Approve** button to approve it. As an Additional Agency Approver, you cannot make any edits to a purchase requisition.



- ▲ If you are approving a Pcard purchase it will automatically be processed into a purchase order once you, or any other assigned Additional Agency Approver approves.

If the purchase requisition is not justified, or any aspect of the purchase requisition requires further revisions, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed.

2



- ▲ 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 emailed to the Requester.

The form shows a text input field labeled 'Reason :'. Below the field are two buttons: 'Cancel' and 'Confirm'.

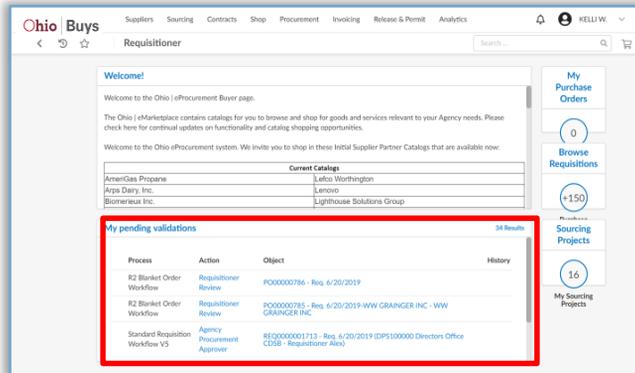
APPROVE A PURCHASE REQUISITION (AGENCY PROCUREMENT APPROVER)

Overview

- What's Covered: This section discusses the process of reviewing, updating, and approving or rejecting a purchase requisition as an Agency Procurement Approver
- Roles: Agency Procurement Approvers
- Used When: A user receives a notification that a purchase requisition requires their review

Step-by-Step Instructions for Approving a Purchase Requisition

Log into Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows the 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 Agency Procurement Approver 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 the **Object** name.



Review the information contained in the purchase requisition. As the Procurement Agency Approver, you can make updates to any field within a purchase requisition apart from Pcard information (if applicable).

- ▲ If a user updates the **Organization** field on the header of a purchase requisition, they must click **Save** and then click **Cancel** on the subsequent popup window that is displayed.
- ▲ If the purchase requisition should be a Pcard purchase, you must reject it back to the Requisitioner with instructions to apply their Pcard. If the initial Requester's Pcard should be applied, instruct the Requisitioner to also reject the purchase with those instructions contained in their comment to the Requester.
- ▲ Note that as the Agency Procurement Approver you are responsible for selecting any **Purchasing Options** that should be applied to the purchase requisition:

- 2 a) **Single Source**: Indicates that the purchase is from one selected Supplier, even though there are other Suppliers that provide similar products.
- b) **Sole Source**: Indicates that the selected Supplier is the only one that can adequately fulfill the need outlined in the purchase requisition.
- c) **Put PR On Hold?**: If DAS Procurement review chooses not to release the procurement, they have the ability to put it on hold and do the procurement on behalf of the agency
- d) **Do Not Encumber**: Selecting this button will not encumber funds in OAKS for the purchase requisition. Please note that if the Pcard slider is selected for a purchase requisition, this option will not be displayed and OAKS will automatically not encumber the purchase.
- e) **Sudden and accidental direct physical damage to property?**: Indicates if the purchase is related to property damage. This requisition will appear in a report sent to DAS Office of Risk Management

Step-by-Step Instructions for Approving a Purchase Requisition

2

▲ Note that as the Agency Procurement Approver you may need to update the **Order Supplier** if one has not already been selected. This can be accessed by clicking the **Pencil** (✎) icon next to a line item, and selecting an **Order Supplier** from the drop-down menu.

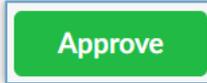
<input type="checkbox"/>	Edit	#	Products types	Ref.	Item description	Supplier	Ordered Quantity	Unit
<input type="checkbox"/>	✎ ✕ ⚠	5264-1	Product		Masking Tape 1"		5.00	Each



Order Supplier ⓘ

3

After you have made the appropriate updates to the purchase requisition, if it is justified, click the **Approve** button to send the purchase requisition to the next step in the approval workflow.



If the Requester's purchase requisition is not justified, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition 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 emailed to the Requester.

Reason :

APPROVE A PURCHASE REQUISITION (AGENCY FISCAL APPROVER)

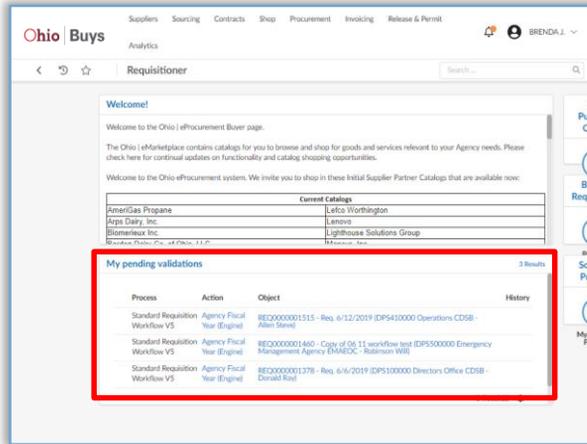
Overview

- What's Covered: This section discusses the process of reviewing, updating, and approving or rejecting a purchase requisition as an Agency Fiscal Approver
- Roles: Agency Fiscal Approvers
- Used When: A user receives a notification that a purchase requisition requires their review

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 the 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 Agency Fiscal Approver 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 the **Object** name.

1



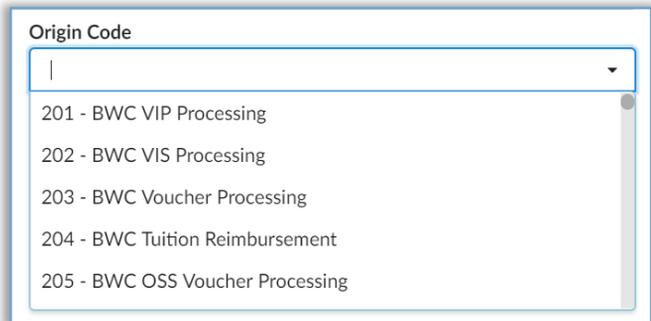
Review the contents of the purchase requisition to see if a Pcard should be used.

2

- If the purchase requisition should be a Pcard purchase, you must reject it back to the Requisitioner with instructions to apply their Pcard.
- ▲ If the initial Requester's Pcard should be applied, instruct the Requisitioner to also reject the purchase with those instructions contained in their comment to the Requester.

In the Header section, review and/or select the appropriate **Origin Code** for the purchase requisition from the drop-down menu.

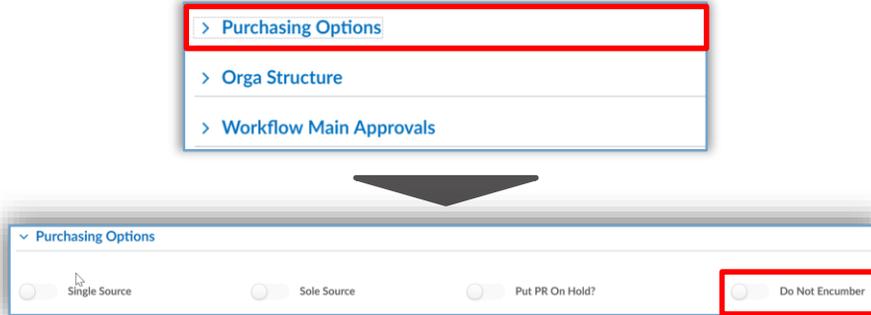
3



Step-by-Step Instructions for Approving a Purchase Requisition

4

In the Header section, click **Purchasing Options** and use the radio button to determine whether or not to encumber the order.



▲ If a purchase requisition is a Pcard purchase, the Do Not Encumber slider will not appear and OAKS will automatically not encumber the purchase.

5

At the bottom of the page under the Items section, click the **Pencil** (✎) icon next to a line item to add or update budget information.

<input type="checkbox"/>	Edit	#	Products types	Ref.	Item description	Supplier	Ordered Quantity	Unit	Price
<input type="checkbox"/>	<input checked="" type="checkbox"/>	2177-1	Product		DEWALT 9.6 VOLT CORDLESS DRILL (SUPPLYWORKS)	SUPPLYWORKS	1.00	Each	137.790

Note: Budget information is defined at the line item level and is not needed for orders that are not being encumbered (with the exception of account code). If the user has chosen to not encumber the order due to using a funding source not managed in OAKS, they should use the comments field to indicate other pertinent funding information.

6

Review the **Supplier Location** field. This field auto-populates with the Supplier's default Supplier Location. If you wish to use another option, you must click the **Use Non-Default Supplier Location Slider**.

Supplier Location

CHK

Use Non-Default Supplier Location

7

If you wish to add budget information using Speed Charts, under the Pricing header, select **Yes** under the option to apply a Speed Chart.

Do you want to apply a Speed Chart?

Yes

No

▲ For more information on applying speed charts, please refer to the [Applying Speed Charts Job Aid](#).

8

Scroll to the bottom of the line item page and click **Budget Information**.

[> Budget Information](#)

Step-by-Step Instructions for Approving a Purchase Requisition

Add or update the chartfield information as appropriate.

The screenshot shows the 'Budget Information' section of a purchase requisition form. Callout A points to the '+ Allocation' button. Callout B points to the 'Edit Lines' button. Callout C points to the 'Filled In' section, which includes radio buttons for 'Percentage' (selected) and 'Amount'. Callout D points to the chartfield grid, which includes dropdown menus for Fund, Account, ALI, Department, Program, Grant/Project, Project, and Service Location. The current values in the grid are: Fund: GRF - GENERAL REVENUE; Account: 521050 - OFFICE SUPPLY & EQ (NOT); ALI: 001699 - INVESTMENT EARNINGS; Department: (empty); Program: 1001C - INTEREST LIABILITY PAYMENT; Grant/Project: (empty); Project: (empty); Service Location: (empty).

- Use the **+Allocation** to create additional chartfield strings for this line item.
- You can update fields in multiple chartfield strings on a line item by clicking the **Checkbox** () icon to their left and then selecting **Edit Lines**.

The 'Allocation Line Mass Update' dialog box contains a 'Save' button, a 'Save & Close' button, and four dropdown menus for 'Fund', 'Account', 'ALI', and 'Department'.

- You can allocate line items by percentage or by amount. The columns for indicating allocation Percentage or Amount are initially located to the far right of the chartfield grid.
- The chartfield information you enter is the same as what was previously entered in OAKS.

- ▲ You must update the chartfield information for each line item individually.
- ▲ When purchasing from an internal Supplier you must fill in the ISTV Xref field. You must update the Account to an ISTV account code whenever an ISTV Xref is present.
- ▲ Account field: Users should click the See All option at the bottom of the dropdown to view only those account codes that are associated with the item's commodity code. (Users will see account codes that may not be linked with the commodity code if they just use the dropdown to select an account code.)

9

After updating the chartfield information and Supplier Location fields as necessary, click the **Save & Close** button.

10

Step-by-Step Instructions for Approving a Purchase Requisition

11

After you have made the appropriate updates to the purchase requisition, and you would like to approve the PR, select the **Approve** button to send the purchase requisition to the next step in the approval workflow.



If the Requester's purchase requisition is not justified, select the **Reject** button. This sends the request back to the Requisitioner who worked on the requisition 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 are emailed to the Requester.

A pop-up comment box with a text input field and "Cancel" and "Confirm" buttons.

If COA validation fails, a red **Resubmit COA Validation** button will appear at the top of the purchase requisition and the associated Fiscal Agency Approver will receive both an email notification and a pending validation.



▲ This means that there was an error validating the chartfield information for this PR. Correct the chartfield information, then click **Resubmit COA Validation**. The PR will continue to appear in your My Pending Validations section, and will not advance until the budget has been corrected.

Please note if a purchase requisition fails COA validation, any fiscal approver in your agency for whom the purchase requisition is in scope can edit and resubmit COA validation.

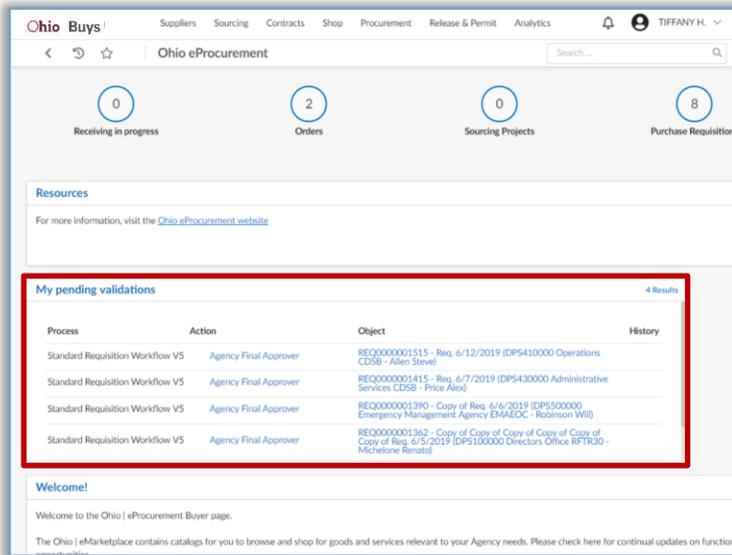
APPROVE A PURCHASE REQUISITION (AGENCY FINAL APPROVER)

Overview

- What's Covered: This section discusses the process of reviewing, updating, and approving or rejecting a purchase requisition as an Agency Final Approver
- Roles: Agency Final Approvers
- Used When: A user receives a notification that a purchase requisition requires their review

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 the 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 Agency Final Approver 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.

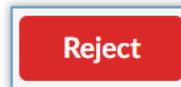


1

Review the information contained in the purchase requisition. If the requisition is justified and the details are satisfactory, click the **Approve** button to approve it. As the Agency Final Approver, you cannot make any edits to a purchase requisition.



If the purchase requisition is not justified, or any aspect of the purchase requisition requires further revisions, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed.



2

▲ 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 emailed to the Requester.

Reason :

Cancel
Confirm

MANAGING PURCHASE REQUISITIONS

Topics

- Forward a Purchase Requisition
- Duplicate and / or Cancel a Purchase Requisition

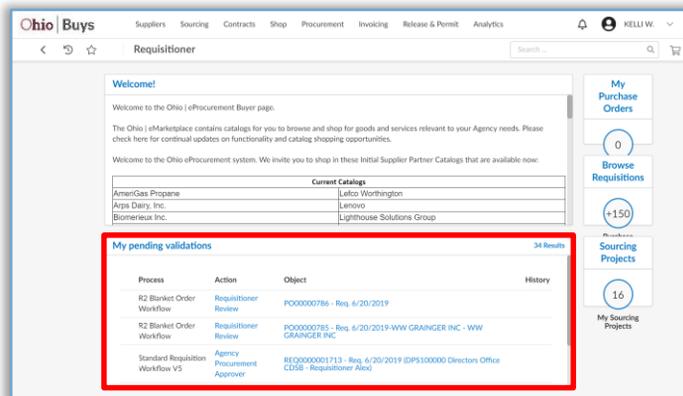
FORWARD A PURCHASE REQUISITION

Overview

- What's Covered: This section discusses the process of forwarding a purchase requisition to another user for review
- Roles: Requester Supervisors, Agency Procurement Approvers, Agency Fiscal Approvers, Agency Final Approvers
- Used When: An approver needs to obtain an additional, or alternative sign-off on a purchase requisition

Step-by-Step Instructions for Forwarding a Purchase Requisition

Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** that corresponds to your role 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.



If you determine, based on the details of the purchase requisition, that an additional approver is required at your step in the workflow, select the **Forward** button.

Forward

- All approver roles in Ohio|Buys can forward a purchase requisition for additional approval.

▲ 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 approves (i.e., the person who was originally assigned this requisition or the person you forward it to), the requisition will move on. If the intent is to make someone else aware of the requisition but not to formally approve it in the system, the non-approver will need to provide any feedback comments outside of Ohio|Buys.

Select the user that you would like to forward the approval to from the dropdown menu. You can forward a PR to any user in your organization who has the Additional Approver role assigned to them.

Forward activity

Forward Save & Close

Please select the user who should validate *

Manager Procurement

See All

▲ If you cannot find a particular user who you believe should be an additional approver on a purchase requisition, please contact your Agency Admin to coordinate and set that user up as an Additional Approver.

Step-by-Step Instructions for Forwarding a Purchase Requisition

4

Select the **Forward** button.



5

Select the **Save and Close** button.



DUPLICATE AND / OR CANCEL A PURCHASE REQUISITION

Overview

- What's Covered: This section discusses the processes of duplicating or cancelling a purchase requisition in Ohio|Buys
- Roles: Requesters, Requisitioners
- Used When: It is expedient to copy the information over from an existing purchase requisition / there is a need to cancel an existing requisition

Ohio Buys Duplicate and/or Cancel a Purchase Requisition

Step-by-Step Instructions for Duplicating a Purchase Requisition

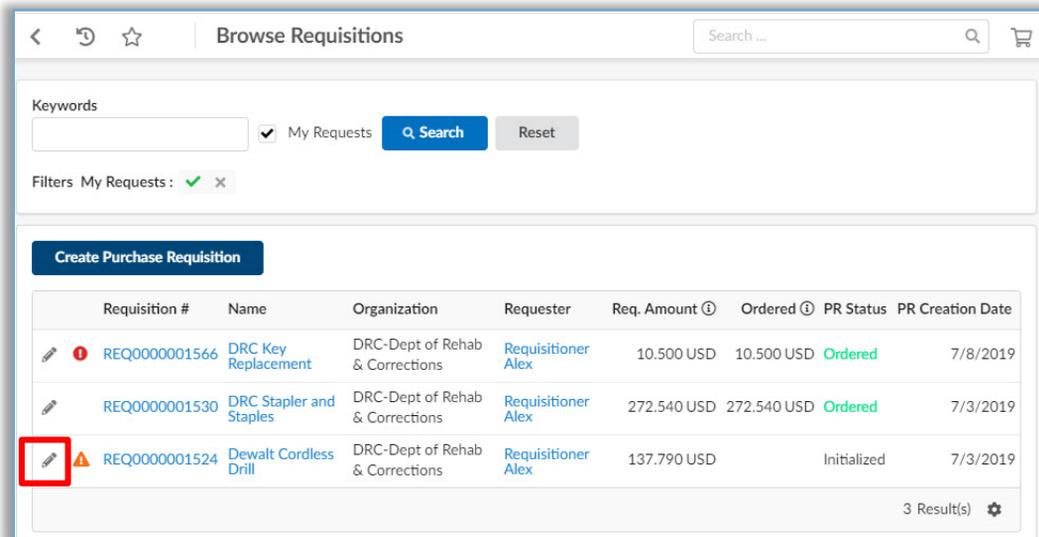
1

▲ Purchase requisitions can be duplicated at any point. When a purchase requisition is duplicated, all valid information in the original purchase requisition will be carried into a new draft purchase requisition, with the following exceptions - attachments, Supplier-facing comments, and Pcard details. The new purchase requisition can then be modified and submitted as needed.

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

2

The Browse Requisitions page is displayed. From this page, you can search for purchase requisitions in your scope. Click the **Pencil (✎)** icon next to the purchase requisition you would like to duplicate.



3

Review the details of the purchase requisition.

a) If the purchase requisition is in a status of Initialized, click **Other Actions**. Select **Duplicate** from the drop-down menu. Click **OK** to confirm.



Step-by-Step Instructions for Duplicating a Purchase Requisition

b) If the purchase requisition is in a status of Ordered, click **Duplicate**. Click **OK** to confirm.

Duplicate

Duplicate?

OK

Cancel

3

4

All of the valid items from the original purchase requisition have been duplicated into a new draft requisition. Make updates to the displayed information as necessary and then submit the requisition for approval.

Step-by-Step Instructions for Canceling a Purchase Requisition

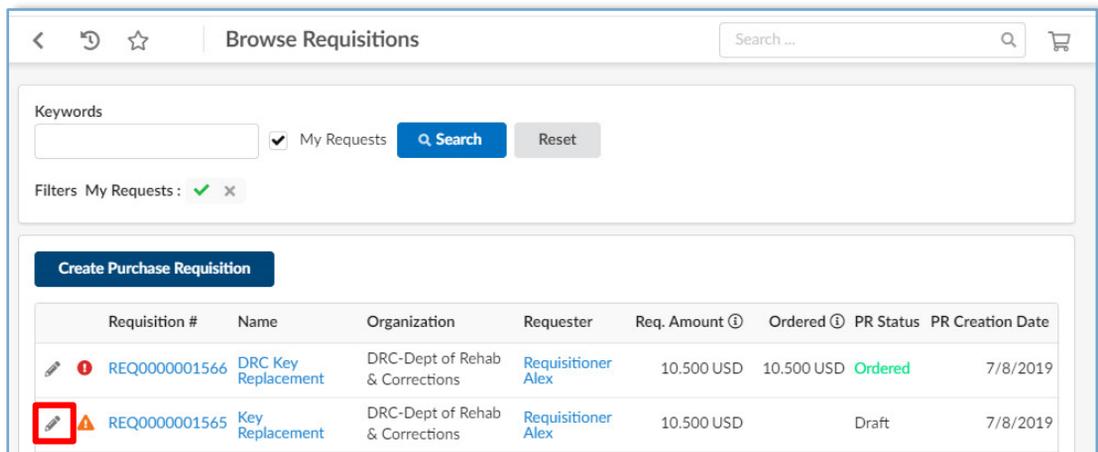
1

▲ Purchase requisitions can be canceled at any point in the Purchase Requisition process - if a purchase order has not been created. Prior to canceling a purchase requisition, users should always communicate with the associated approvers to notify them of the reason for the cancellation. If a user would like to make changes to a purchase requisition once it has been submitted, they are able to withdraw and resubmit the purchase requisition by completing the following steps: duplicate the purchase requisition, make updates to the new purchase requisition as necessary, submit the new purchase requisition, and then cancel the original purchase requisition.

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

2

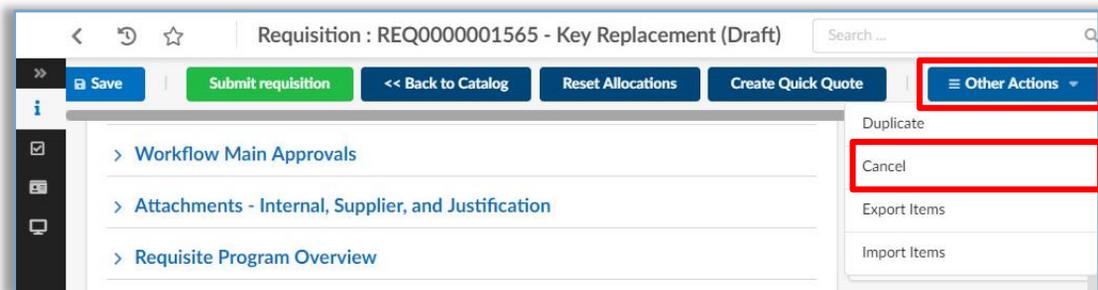
The Browse Requisitions page is displayed. From this page, you can search for purchase requisitions in your scope. Click the **Pencil** () icon next to the purchase requisition you would like to Cancel.



Requisition #	Name	Organization	Requester	Req. Amount	Ordered	PR Status	PR Creation Date
REQ0000001566	DRC Key Replacement	DRC-Dept of Rehab & Corrections	Requisitioner Alex	10.500 USD	10.500 USD	Ordered	7/8/2019
REQ0000001565	Key Replacement	DRC-Dept of Rehab & Corrections	Requisitioner Alex	10.500 USD		Draft	7/8/2019

3

Review the details of the purchase requisition. Be sure to contact whoever is currently reviewing or working on the purchase requisition prior to canceling it in Ohio|Buys. Once you are ready to cancel the purchase requisition, click **Other Actions** and select **Cancel** from the drop-down menu.



Requisition: REQ0000001565 - Key Replacement (Draft)

Save | Submit requisition | << Back to Catalog | Reset Allocations | Create Quick Quote | **Other Actions**

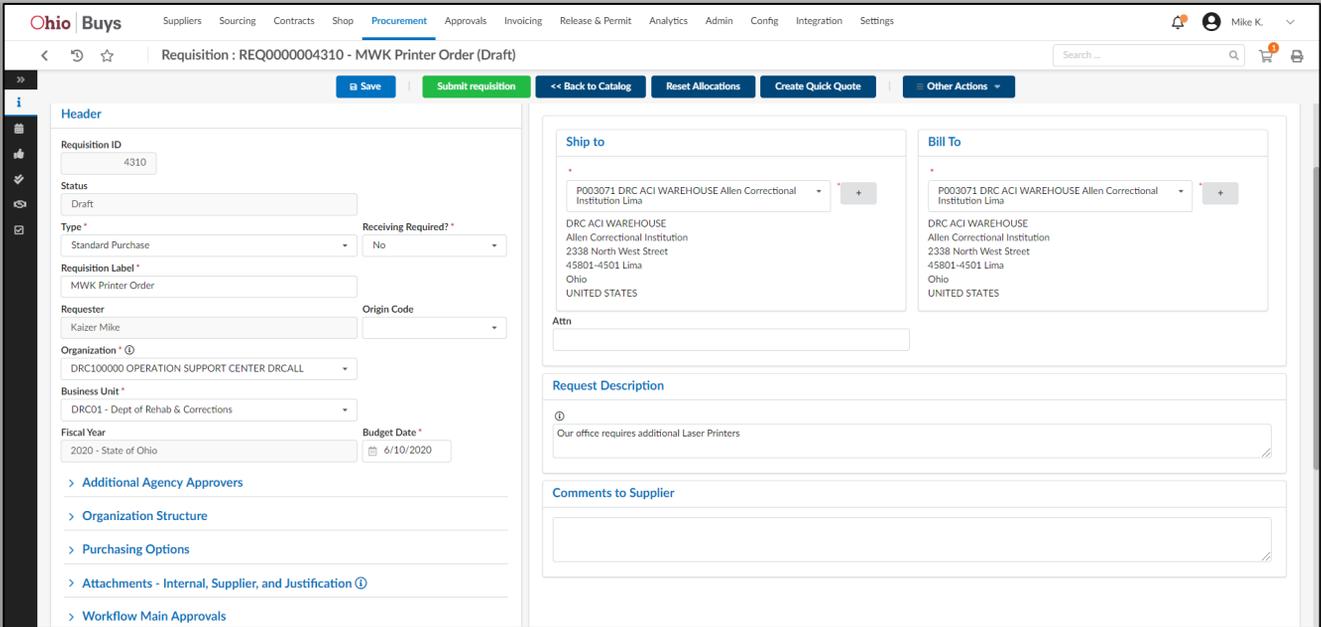
- > Workflow Main Approvals
- > Attachments - Internal, Supplier, and Justification
- > Requisite Program Overview

Duplicate
Cancel
Export Items
Import Items

APPENDIX

PURCHASE REQUISITION FIELD GUIDE

Requisition Field Guide: Requisition Header (1/2)



Object	Definition	Additional Info
Additional Agency Approvers		
Attachments - Internal, Supplier, and Justification	Expands when selected to display a button where users can upload attachments for both internal use and Suppliers. Most file formats are supported	
Attn	The person who will be responsible for receiving the items in the purchase requisition	Also available at line item level
Bill to	The address to which the Supplier will bill for the purchase requisition	Mandatory field
Budget Date	The budget date for the purchase requisition, defaults to the date the purchase requisition is created	Mandatory field
Business Unit	The Business Unit that the purchase requisition is for, usually the Requester's agency	Mandatory field
Comments to Supplier	A free text entry field where users can input comments that will be visible to the Supplier	Also available at line item level
Fiscal Year	The fiscal year that the purchase requisition falls under, populates automatically based on the Budget Date after the purchase requisition is saved	Non-editable
Organization	The division or site that the purchase requisition is for	Mandatory field
Organization Structure	Expands when selected to display more information about the organization that the purchase requisition is for	
Origin Code	A code used in vouchering to drive the approval workflow, can be entered by any user but must be entered by Fiscal Approver step	Mandatory field (Fiscal Approver)
Purchasing Options	Expands when selected to display buttons for: Single Source, Sole Source, Put PR on Hold, Do Not Encumber, Request DAS to Source, or indicate request is related to sudden and accidental direct property damage	
Receiving Required	Indicates whether receiving within Ohio Buys will be required in order to process any invoices on the purchase requisition, defaults to No	Mandatory field

Requisition Field Guide: Requisition Header (2/2)

Object	Definition	Additional Info
Request Description	A free text entry field where users can add additional information about the purchase requisition that will be visible to State users (e.g., justification)	
Requester	The user that the purchase requisition is for, this field generally populates with the name of the user who creates the purchase requisition, however some users have the ability to purchase on behalf of other users and should indicate the recipient of the purchase here	
Requisition ID	An automatically assigned ID number that can be used to find the requisition	Non-editable
Requisition Label	The name of the requisition in Ohio Buys	Mandatory field
Ship To	The address to which the Supplier will ship the purchase assuming that all items are going to the same location	Mandatory field Also available at line item level
Status	The status of the purchase requisition which updates automatically, some common statuses include: Draft, Initialized, and Ordered	Non-editable
Type	A selector where users can indicate that a requisition is either Standard, After the Fact, or a Blanket/Encumbrance Order	Mandatory Field
Workflow Main Approvals	Expands when selected to display the main approvals that have been processed so far on the purchase requisition	

Requisition Field Guide: Requisition Header Item View

Items

→ 0 Selected

<input type="checkbox"/>	Edit	#	Products types	Ref.	Item description	Supplier	Ordered Quantity	Unit	Price	Total	Deliv. date	Start Date
<input type="checkbox"/>			5955-1 Product	163460	Bostitch(R) B8(R) Impulse(TM) 45 El...	(GBEX LLC) GBEX LLC	5.00	Each	184.860	924.300	5/14/2020	

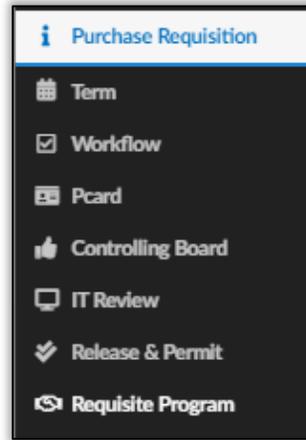
Object	Definition	Additional Info
Add a line	Click to add a new blank line item to a purchase requisition	
Copy Selected Lines	After selecting a line(s) using the checkbox(s) to the left, click to create copies of the selected lines	
Delete Lines	After selecting a line(s) using the checkbox(s) to the left, click to delete the line items	
Edit Lines	After selecting a line(s) using the checkbox(s) to the left click to open and edit the line item	
Line Item	An item contained in the purchase requisition, displays certain information about the line item in a table (discussed in more detail on the next page)	Additional fields visible offscreen
Pencil Icon	Click to open a line item and view it in more detail	
Trashcan Icon	Click to delete a line item	

Requisition Header Buttons

Object	Definition	Additional Info
Back to Catalog	Returns to the Browse Items page of Ohio Buys	
Create Quick Quote	Initiates a Quick Quote (for more information please review the Quick Quote Learner Guide)	
Other Actions	Provides the options to duplicate or cancel a requisition	
Reset Allocations	Resets any chartfield information that has been entered	
Save	Saves any changes made to the purchase requisition	
Submit Requisition	Submits a purchase requisition and initiates the appropriate approval workflow	

Requisition Field Guide: Requisition Header

Purchase Requisition Tabs



Object	Definition	Additional Info
Purchase Requisition	In this tab, users can view and edit most of the details about a purchase requisition including the and line items	
Term	If the purchase requisition is for items that will be operating under a schedule or term, users should open this tab and complete the details onscreen. (for more information, please refer to the Create a Blanket Order Job Aid and Add Subscription or Milestone Terms Job Aid)	
Workflow	Displays a detailed workflow that indicates where a purchase requisition is in the process of becoming an order, boxes highlighted in green are complete while those highlighted in orange are in progress	
Pcard	Only visible for Pcard purchase requisitions, if a user has multiple Pcards they should navigate to this tab to select which of your Pcards to apply to an order	
Controlling Board	The tables displayed in this tab provide detail around any relevant controlling board waivers associated with a purchase requisition, as well as depicting relevant Direct Purchase Authority and spending thresholds	
IT Review	If the purchase requisition requires IT approval, the comments from those approvers will be displayed here	
Release & Permit	If the purchase requisition requires a Release & Permit, the Release and Permit information will automatically populate here once it has been granted	
Requisite Program	If the purchase requisition is for a commodity that is offered by a requisite procurement program, the progress of obtaining any necessary waivers from Requisite Procurement Agencies will be displayed here.	

Requisition Field Guide: Line Item (1/2)

Describe the item

ID: 8437

Name: Bostitch(R) B8(R) Impulse(TM) 45 Electric Stapler, Black

Item Code: []

Ordered Quantity: 5.00 Each

Commodity: 44121615 - Staplers

Profile ID: []

Products types: Product

MBE Set Aside: M

Delivery Date: 5/14/2020

Product Code: []

Continuation? Yes No

Select Supplier

Supplier: GBEX LLC

Order Supplier: GBEX LLC

Supplier Contact: BOLAND JIM

Supplier Location: []

Use Non-Default Supplier Location

Dealers Available

Controlling Board Number: []

Object	Definition	Additional Info
Commodity	The commodity code associated with the line item	Mandatory field
Continuation?	Click Yes if this is a continuation of a previous order, else leave as No	
Controlling Board Number	If a controlling board number needs to be applied to a purchase requisition, it will populate here	
Dealers Available Slider	If there are dealers available for this line item, this slider will automatically engage (indicates a quick quote must be performed)	
Delivery Date	The requested delivery date for the line item (must be set by the user)	Mandatory field
ID	A unique ID is assigned to each line of every purchase requisition	Non-editable
Item Code	The unique code assigned to an item by its Supplier (applies only to hosted catalog items)	Non-editable
MBE Set Aside Drop-Down	Click to select if the item is MBE or EDGE compliant	
Name	The name of the line item	Only editable for freeform items
Order Supplier	The specific location of the Supplier that will fulfill the purchase requisition	
Ordered Quantity	The quantity of items ordered, can be modified to be measured in different ways such (e.g. each, box, bag etc.)	Mandatory field
Product Code	A unique value provided by some Suppliers in their catalogs	Non-editable
Products Types	States whether the line item is for a Product or a Service (currently only product can be selected, however Services may be ordered in Ohio Buys)	Mandatory field
Profile ID	Used for asset management	Non-editable
Supplier	The Supplier for the line item	
Supplier Contact	The primary point of contact for the line item, Supplier Contacts are determined at the Order Supplier level	
Supplier Location	How the Supplier is paid, defaults to the Supplier's preference in OAKS	
Use Non-Default Supplier Location	Click if you are using a Supplier location other than the default in OAKS	

Requisition Field Guide: Line Item (2/2)

Pricing

184.860 USD

Total Amount: 924.300

Supplier Quote ID ⓘ

Do you want to apply a Speed Chart?

Yes

No

Speed Chart can be applied ⓘ

Define delivery place

Ship to

P003071 DRC ACI WAREHOUSE Allen Correctional Institution Lima +

DRC ACI WAREHOUSE
Allen Correctional Institution
2338 North West Street
45801-4501 Lima
Ohio

Attn

> [Release & Permit](#)

> [More Item Information](#)

> [Budget Information](#)

Object	Definition	Additional Info
Attn	The person who will be responsible for receiving this line item in the purchase requisition	Also available at the Header level
Budget Information	Click to expand, displays where to enter chartfields and allocations	
Do you want to apply a Speed Chart?	If your agency utilizes speed charts, click Yes and you will be presented with options to apply them, otherwise leave as No	
More Item Information	Click to expand, displays additional item information such as the Product (if from a hosted catalog), and contract information	
Pricing	The price of one unit of the line item	Mandatory field when creating a freeform line item
Release & Permit	Click to expand, if a Release and Permit is applied to the line item its information will be displayed here	
Ship To	Where the item will be shipped, different Ship To addresses can be applied to each line item across a purchase order and override the header level Ship To address	Also available at the Header level
Supplier Quote ID	If utilizing a unique price, the Quote ID from the Supplier should be input here (note that when completing a quick quote this field will be populated automatically once prices are updated)	
Total Amount	The total cost of the line items	Non-editable, updates based on price and quantity

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0		Initial draft	All
2.0		Updated Pcard process	All
3.0	6/15/2020	Updated Receiving Required and Additional Agency Approvers	27, 33, 42, 50, 60, 74
4.0	7/24/20	Updates related to Release 2 Sprint 7	43, 52, 61, 79, 98
5.0	8/6/20	Updates related to Release 2 Sprint 8	72, 83, 94
6.0	8/21/20	Added after the fact purchase requisition clarification	32
6.1	9/3/2020	Added details on how to copy allocation lines	88