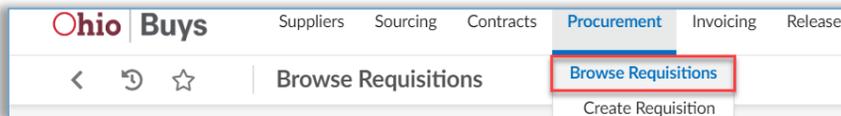


## Step-by-Step Instructions for Reviewing Purchase Requisitions Status

- ▲ Ohio|Buys purchase requisitions and change orders must be in “Ordered” status (or in the case of ODOT, in “ODOT Complete” status) on or before OAKS and Ohio|Buys are shut down to facilitate the fiscal year end process. Any transaction that is not in “Ordered” status (or in the case of ODOT, in “ODOT Complete” status) will be cancelled or deleted by State Admins when they begin fiscal year end processing.

To find your purchase requisitions that are pending approval or require your action:

- a) From the Main Menu Navigation Bar, click **Procurement** and then select **Browse Requisitions** from the drop-down menu.

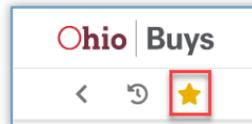


- a) Click the **My Requests** checkbox.  My Requests

- b) Click **Search**.



- ▲ To save this view, click the **Favorite** (★) icon and name the view. Then press enter on your keyboard.



- d) Review the **Status** of your purchase requisitions. Refer to the Purchase Requisition Status table on the next page for an overview of what each purchase requisition status indicates.
- e) Click on the **Pencil** (✎) icon to open a purchase requisition to review its approval history in more detail.

- ▲ In addition to checking the status of purchase requisitions on the Browse Requisitions page, users can also run the **Requisitions still pending approval** and the **Change order in progress** queries. To access these queries:

- Click **Analytics** from the Main Menu Navigation Bar and then select **Browse Queries** from the drop-down menu.
- Enter the name of the query in the **Keywords** field.
- Click **Search**.
- Click the **Extract** (📄) icon for the query you would like to run.

## Step-by-Step Instructions for Reviewing Purchase Requisitions Status

Refer to the following table for a description of each purchase requisition status. If you would like to see who is currently reviewing or working on a particular purchase requisition, open the associated purchase requisition and review the **Approval history** pane on the **Workflow** tab.

▲ If an in progress purchase requisition is no longer required, click **Other Actions** and select **Cancel** from the drop-down menu. Be sure to contact whoever is currently reviewing or working on the purchase requisition prior to canceling it in Ohio|Buys.

Purchase Requisition (PR) Status	Description
Draft	The PR is waiting to be submitted for approval by the user who created it. If a PR is rejected by a Requester's Supervisor, the PR will go back to "Draft" status.
Supervisor	The PR is waiting to be reviewed and approved by the Requester's HCM Supervisor.
Address Approval	The PR contains a one-time delivery address that needs to be reviewed and approved by an Agency Admin.
Requisitioner Assignment	The PR is waiting to be assigned to a Requisitioner by a Workload Manager. Please note only certain agencies use a Workload Manager to assign PRs.
Requisitioner Approval	The PR is waiting to be reviewed and approved by a Requisitioner. Any PR that is rejected by an Agency Procurement Approver, Requisite Program, Agency Fiscal Approver, IT Analysts, DAS Procurement Manager, Agency Final Approver, or Central Approver will return to "Requisitioner Approval" status.
Procurement Approval	The PR is waiting for Agency Procurement Approval.
Under Requisite Program Review	The PR is waiting to be reviewed by the necessary Requisite Procurement Program Agencies.
Fiscal Approval	The PR is waiting for Agency Fiscal Approval.
IT Release & Permit	The PR is in the IT Release & Permit process.
Under DAS Review	The PR is awaiting review from a DAS Procurement Manager.
Final Approval	The PR is waiting for Agency Final Approval.
Central Approvals	The PR contains a commodity for Fleet, Printing, or Personal Services and is waiting for the relevant Central SME's approval.
Ordered	The PR has received all of the necessary approvals and a PO has been created. Please open the associated PO to ensure there are no integration errors and that the PO has been dispatched to the associated Supplier.

## Step-by-Step Instructions for Reviewing Purchase Requisitions Status

Refer to the following pages for a detailed explanation of how to read and interpret each section of the **Approval history** and **Previous Approvals & Refusals** pane. There are three different tables that show related, but distinct information regarding approvals.

- a) To view the users who completed the final review at each stage in the purchase requisition workflow, log in to Ohio Buys and open the purchase requisition for which you would like to review the approval history. On the **Workflow** tab, scroll down to the **Approval history** pane.

Requisition : REQ0000004356 - GSD-2100-WG-W&D North America - \$10,438.30 FY 20 (Ordered)

Approval history

Activity	Name	Delegate to	Created on (UTC-4)	Validated on (UTC-4)	State	Due date (UTC-4)	Performed by
Order	GREEN STACEY		6/23/2020 3:37:27 PM	6/23/2020 3:37:27 PM	○○●		GREEN STACEY
Budget Validation	GREEN STACEY		6/23/2020 3:37:27 PM	6/23/2020 3:37:27 PM	○○●		GREEN STACEY
Agency Final Approver	GREEN STACEY		6/23/2020 3:36:26 PM	6/23/2020 3:37:27 PM	○○●		GREEN STACEY
COA Validation	SILK KRISTEN		6/23/2020 3:36:26 PM	6/23/2020 3:36:26 PM	○○●		SILK KRISTEN
Agency Fiscal Approver	SILK KRISTEN		6/23/2020 3:32:11 PM	6/23/2020 3:33:01 PM	○○●		SILK KRISTEN
Agency Procurement Approver	GLASS WANDA		6/23/2020 3:29:03 PM	6/23/2020 3:29:55 PM	○○●		GLASS WANDA
Requisitioner Approval	REQUISITIONER Ari		6/23/2020 3:27:34 PM	6/23/2020 3:29:03 PM	○○●		REQUISITIONER Ari
Initiate Agency Approvals	REQUISITIONER Ari		6/23/2020 3:29:03 PM	6/23/2020 3:29:03 PM	○○●		REQUISITIONER Ari
Workload Manager	WORKLOAD Manager		6/23/2020 3:26:13 PM	6/23/2020 3:27:34 PM	○○●		WORKLOAD Manager
Requester Supervisor	SANDERS KELLY		6/23/2020 3:25:15 PM	6/23/2020 3:26:13 PM	○○●		SANDERS KELLY
Draft Requisition	PURR TERESA		6/23/2020 3:25:15 PM	6/23/2020 3:25:15 PM	○○●		PURR TERESA

11 Result(s)

- b) To view all of the users at your agency who acted on a purchase requisition at **any** agency review step in the workflow, (i.e., Agency Procurement Approver, Agency Fiscal Approver, Agency Final Approver) scroll down on the **Workflow** tab and review the **Workflow Main Approvals** section.

Workflow Main Approvals

Activity	Name	Agency	Order	Validated on (UTC-4)	Approved	Performed by
Procurement	RAMSEY DEBORAH	DAS-Administrative Services	10	6/23/2020 3:29:55 PM	✓	GLASS WANDA
Procurement	GLASS WANDA	DAS-Administrative Services	10	6/23/2020 3:29:55 PM	✓	GLASS WANDA
Procurement	RICHARDSON NYCHOLA	DAS-Administrative Services	10	6/23/2020 3:29:55 PM	✓	GLASS WANDA
Procurement	MENIX MARIA	DAS-Administrative Services	10	6/23/2020 3:29:55 PM	✓	GLASS WANDA
Procurement	OBRIEN LINDA	DAS-Administrative Services	10	6/23/2020 3:29:55 PM	✓	GLASS WANDA
Fiscal	KIMES PAULA	DAS-Administrative Services	10	6/23/2020 3:32:11 PM	✓	KIMES PAULA
Fiscal	BLAND CHER	DAS-Administrative Services	10	6/23/2020 3:32:11 PM	✓	KIMES PAULA
Fiscal	CRIDER MATTHEW	DAS-Administrative Services	10	6/23/2020 3:32:11 PM	✓	KIMES PAULA
Fiscal	HOLLINGSWORTH MARK	DAS-Administrative Services	10	6/23/2020 3:32:11 PM	✓	KIMES PAULA
Fiscal	PINSKER JUSTIN	DAS-Administrative Services	10	6/23/2020 3:32:11 PM	✓	KIMES PAULA
Fiscal	HURST JON	DAS-Administrative Services	10	6/23/2020 3:32:11 PM	✓	KIMES PAULA
Fiscal	SILK KRISTEN	DAS-Administrative Services	20	6/23/2020 3:33:01 PM	✓	SILK KRISTEN
Fiscal	HITE NANCY	DAS-Administrative Services	20	6/23/2020 3:33:01 PM	✓	SILK KRISTEN
Final	GREEN STACEY	DAS-Administrative Services	10	6/23/2020 3:37:27 PM	✓	GREEN STACEY
Final	JOHNSON TAMMY	DAS-Administrative Services	10	6/23/2020 3:37:27 PM	✓	GREEN STACEY

## Overview of the Approval History Pane

Approval history

A Activity	B Name	Delegate to	C Created on (UTC-5)	Validated on (UTC-5)	D State	Due date (UTC-5)	Initial performer
Order	JOHNSON TAMMY		12/4/2019 4:34:53 PM	12/4/2019 4:34:53 PM	<input checked="" type="radio"/>		JOHNSON TAMMY
Budget Validation	JOHNSON TAMMY		12/4/2019 4:34:53 PM	12/4/2019 4:34:53 PM	<input checked="" type="radio"/>		JOHNSON TAMMY
Agency Final Approver	JOHNSON TAMMY		12/4/2019 4:33:20 PM	12/4/2019 4:34:53 PM	<input checked="" type="radio"/>		JOHNSON TAMMY
COA Validation	SILK KRISTEN		12/4/2019 4:33:20 PM	12/4/2019 4:33:20 PM	<input checked="" type="radio"/>		SILK KRISTEN
Agency Fiscal Approver	SILK KRISTEN		12/4/2019 4:31:58 PM	12/4/2019 4:33:20 PM	<input checked="" type="radio"/>		SILK KRISTEN
Agency Procurement Approver	GLASS WANDA		12/4/2019 4:13:35 PM	12/4/2019 4:30:27 PM	<input checked="" type="radio"/>		GLASS WANDA
Requisitioner Approval	GARVER ANNA		12/4/2019 4:03:46 PM	12/4/2019 4:13:35 PM	<input checked="" type="radio"/>		GARVER ANNA
Initiate Agency Approvals	GARVER ANNA		12/4/2019 4:13:35 PM	12/4/2019 4:13:35 PM	<input checked="" type="radio"/>		GARVER ANNA
Workload Manager	HITE NANCY		12/4/2019 3:52:04 PM	12/4/2019 3:56:17 PM	<input checked="" type="radio"/>		HITE NANCY
Requester Supervisor	SANDERS KELLY		12/4/2019 3:50:35 PM	12/4/2019 3:52:04 PM	<input checked="" type="radio"/>		SANDERS KELLY
Draft Requisition	PURR TERESA		12/4/2019 3:50:35 PM	12/4/2019 3:50:35 PM	<input checked="" type="radio"/>		PURR TERESA

11 Result(s) 

A

The **Activity** column will display each workflow step for a purchase requisition, from creation through all approval steps. Approval steps can be manual or system-validated (e.g., Budget Validation). Note that the steps are ordered from most recent to oldest (e.g., the above example shows the most recent activity was Order creation, the oldest will always be Draft Requisition).

B

The **Name** column will show the person who performed each Activity.

For system-validated approvals (i.e., Initiate Agency Approvals, COA Validation, Budget Validation, and Order), the listed name will be the last manual approver (e.g., in the above example, TAMMY JOHNSON was the last manual approver in the Agency Final Approver step, thus her name is displayed next to the system-validated Budget Validation and Order steps).

C

The **Created on** column will show the date and time when the activity began (i.e., when the purchase requisition moved to that step in the approval process). The **Validated on** column will show the date and time when the activity was completed (i.e., when the purchase requisition moved to the next step in the approval process).

D

The radio buttons in the **State** column will be green if the activity has been validated (approved), orange if the validation is pending, and red if the activity had been rejected.

## Overview of Reviewing a Forwarded Purchase Requisition

A Workload Manager assigned Requisitioner ANNI EFTHIMIOU on 12/4/2019 at 3:56:17 PM.

### Approval history

Activity	Name	Delegate to	Created on (UTC-5)	Validated on (UTC-5)	State	Due date (UTC-5)	Initial performer
Requisitioner Approval	EFTHIMIOU ANNI		12/4/2019 3:56:17 PM		○ ● ○		EFTHIMIOU ANNI
Workload Manager	HITE NANCY		12/4/2019 3:52:04 PM	12/4/2019 3:56:17 PM	○ ○ ●		HITE NANCY
Requester Supervisor	SANDERS KELLY		12/4/2019 3:50:35 PM	12/4/2019 3:52:04 PM	○ ○ ●		SANDERS KELLY
Draft Requisition	PURR TERESA		12/4/2019 3:50:35 PM	12/4/2019 3:50:35 PM	○ ○ ●		PURR TERESA

4 Result(s)

Requisitioner ANNI EFTHIMIOU adds a comment and forwards the purchase requisition to ANNA GARVER at 4:03:46 PM. Now, the purchase requisition is in both ANNA and ANNI's worklist.

By EFTHIMIOU ANNI, At 12/4/2019 4:02:28 PM

Hi Anna: Forwarding to you for your review and approval or rejection. Thanks, Anni

### Approval history

Activity	Name	Delegate to	Created on (UTC-5)	Validated on (UTC-5)	State	Due date (UTC-5)	Initial performer
Requisitioner Approval	EFTHIMIOU ANNI		12/4/2019 3:56:17 PM		○ ● ○		EFTHIMIOU ANNI
Requisitioner Approval	GARVER ANNA		12/4/2019 4:03:46 PM		○ ● ○		EFTHIMIOU ANNI
Workload Manager	HITE NANCY		12/4/2019 3:52:04 PM	12/4/2019 3:56:17 PM	○ ○ ●		HITE NANCY
Requester Supervisor	SANDERS KELLY		12/4/2019 3:50:35 PM	12/4/2019 3:52:04 PM	○ ○ ●		SANDERS KELLY
Draft Requisition	PURR TERESA		12/4/2019 3:50:35 PM	12/4/2019 3:50:35 PM	○ ○ ●		PURR TERESA

5 Result(s)

## Overview of Reviewing a Forwarded Purchase Requisition

ANNA GARVER approves the purchase requisition on 12/4/2019 at 4:13:35 PM and her name is logged as the performer for the Requisitioner Approval step.

By EFTHIMIOU ANNI , At 12/4/2019 4:02:28 PM

Hi Anna: Forwarding to you for your review and approval or rejection. Thanks, Anni

**Approval history**

Activity	Name	Delegate to	Created on (UTC-5)	Validated on (UTC-5)	State	Due date (UTC-5)	Initial performer
Agency Procurement Approver	PROCUREMENT MANAGER 1 SIT		12/4/2019 4:13:35 PM		○●○		PROCUREMENT MANAGER 1 SIT
Agency Procurement Approver	RAMSEY DEBORAH		12/4/2019 4:13:35 PM		○●○		RAMSEY DEBORAH
Agency Procurement Approver	GLASS WANDA		12/4/2019 4:13:35 PM		○●○		GLASS WANDA
Agency Procurement Approver	PHILLIPS LATASHA		12/4/2019 4:13:35 PM		○●○		PHILLIPS LATASHA
Agency Procurement Approver	RICHARDSON NYCHOLA		12/4/2019 4:13:35 PM		○●○		RICHARDSON NYCHOLA
Agency Procurement Approver	MENIX MARIA		12/4/2019 4:13:35 PM		○●○		MENIX MARIA
Agency Procurement Approver	OBRIEN LINDA		12/4/2019 4:13:35 PM		○●○		OBRIEN LINDA
Agency Procurement Approver	AGENCYPROCUREMENTMANAGER SIT		12/4/2019 4:13:35 PM		○●○		AGENCYPROCUREMENTMANAGER SIT
Requisitioner Approval	GARVER ANNA		12/4/2019 4:03:46 PM	12/4/2019 4:13:35 PM	○●●		GARVER ANNA
Initiate Agency Approvals	GARVER ANNA		12/4/2019 4:13:35 PM	12/4/2019 4:13:35 PM	○●●		GARVER ANNA
Workload Manager	HITE NANCY		12/4/2019 3:52:04 PM	12/4/2019 3:56:17 PM	○●●		HITE NANCY
Requester Supervisor	SANDERS KELLY		12/4/2019 3:50:35 PM	12/4/2019 3:52:04 PM	○●●		SANDERS KELLY

Although the original Requisitioner ANNI EFTHIMIOU is not listed in the Name column, the time stamps between the Workload Manager activity completion at 3:56:17 PM and the Requisitioner Approval activity creation at 4:03:46 PM will tell us the amount of time that the purchase requisition was with the original Requisitioner, in this case: 4:03:46 PM – 3:56:17 PM = 7 minutes and 31 seconds.

Agency Procurement Approver	GLASS WANDA	12/4/2019 4:13:35 PM	12/4/2019 4:30:27 PM	○●●
Requisitioner Approval	GARVER ANNA	12/4/2019 4:03:46 PM	12/4/2019 4:13:35 PM	○●●
Initiate Agency Approvals	GARVER ANNA	12/4/2019 4:13:35 PM	12/4/2019 4:13:35 PM	○●●
Workload Manager	HITE NANCY	12/4/2019 3:52:04 PM	12/4/2019 3:56:17 PM	○●●

## Overview of Reviewing a Forwarded Purchase Requisition

- c) To view any previous rejections for a purchase requisition open the **Previous Approvals & Refusal** section on the Workflow tab. This section will also show any associated rejection comments and any prior approvals received for the purchase requisition. If a purchase requisition has been rejected and traveled down the approval path multiple times, details surrounding each step will be found in this section.

A Activity	B Name	C Created on (UTC-5)	Date (UTC-5)	D State	Initial performer
COA Validation	AGENCYADMIN Ari	1/29/2020 12:45:26 PM	1/29/2020 12:45:26 PM	<input type="radio"/> <input checked="" type="radio"/>	AGENCYADMIN Ari
Budget Error Fix	DRCFISCALAPPROVER Training	1/29/2020 12:41:29 PM	1/29/2020 12:43:33 PM	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	DRCFISCALAPPROVER Training
COA Validation	DRCFISCALAPPROVER Training	1/29/2020 12:43:33 PM	1/29/2020 12:43:33 PM	<input type="radio"/> <input checked="" type="radio"/>	DRCFISCALAPPROVER Training
Budget Error Fix	DRCFISCALAPPROVER Training	1/29/2020 12:40:19 PM	1/29/2020 12:41:29 PM	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	DRCFISCALAPPROVER Training
Budget Error Fix	DRCFISCALAPPROVER Training	1/29/2020 12:38:26 PM	1/29/2020 12:40:19 PM	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	DRCFISCALAPPROVER Training
Agency Fiscal Approver	DRCFISCALAPPROVER Training	1/29/2020 12:35:04 PM	1/29/2020 12:38:26 PM	<input type="radio"/> <input checked="" type="radio"/>	DRCFISCALAPPROVER Training
Agency Procurement Approver	DRCPROCAGENCYAPPROVER Training	1/29/2020 12:34:31 PM	1/29/2020 12:35:04 PM	<input type="radio"/> <input checked="" type="radio"/>	DRCPROCAGENCYAPPROVER Training
Agency Procurement Approver	DRCPROCAGENCYAPPROVER Training	1/29/2020 12:30:06 PM	1/29/2020 12:31:43 PM	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	DRCPROCAGENCYAPPROVER Training
Initiate Agency Approvals	REQUISITIONER Ari	1/29/2020 12:30:06 PM	1/29/2020 12:30:06 PM	<input type="radio"/> <input checked="" type="radio"/>	REQUISITIONER Ari

9 Result(s)

A

The **Activity** column will display each workflow step for a purchase requisition, from creation through all approval steps. Approval steps can be manual or system-validated (e.g., Budget Validation). Note that the steps are ordered from most recent to oldest.

B

The **Name** column will show the person who performed each Activity.

For system-validated approvals (i.e., Initiate Agency Approvals, COA Validation, Budget Validation, and Order), the listed name will be the last manual approver.

C

The **Created on** column will show the date and time when the activity began (i.e., when the purchase requisition moved to that step in the approval process). The **Date** column will show the date and time when the activity was completed (i.e., when the purchase requisition moved to the next step in the approval process).

D

The radio buttons in the **State** column will be green if the activity has been validated (approved), orange if the validation is pending, and red if the activity had been rejected and there will be an orange text bubble. Hovering over that text bubble will reveal the justification for the rejection.

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