

Step-by-Step Instructions for Viewing Controlling Board and Direct Purchase Authority Calculations

▲ When a user submits a purchase requisition (PR), Ohio Buys will run a query to calculate the following: Is any part of the PR exempt from Direct Purchase Authority (DPA) or Controlling Board (CB)? Is the purchase exceeding either DPA or CB threshold?

The results of this query will appear on the Controlling Board tab of the PR:

OAKS_ID	Supplier	CB code	Threshold Type	Items Aggregated	Items Total	Threshold Limit	Al
0000201583	AGILEASSETS INC	DOT0100812-2020-DOT01-DOT01-0000201583	CB	5104-1	650,000.00	1,000,000,000.00	

Example PR with CB Data

BU	OAKS_ID	Supplier	Intragroup Supplier	CB code	Threshold Type	Items Aggregated	Items Total	Threshold Limit
DOH	0000249278	PPG ARCHITECTURAL COATINGS	No	Not Applicable	DPA	4659-1	15,000.00	49999.99

Example PR with DPA Data

▲ The figure above displays the text “On Going Data” as this information could change as the PR routes through the workflow. The purchase status and threshold status on the header of the PR will be used for workflow routing (i.e., if any line item has exceeded threshold, the workflow will route accordingly.) Depending on the type of purchase, you will see information in the Threshold Control section in the CB or DPA tables.

▲ Below are brief descriptions of the columns you will see on this tab:

- Threshold Limit: State of OH CB limit
- PR Amount Not Exempt: Amount of the PR that is not CB or DPA exempt

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- Total Amount Exempt: Amount of the PR that is CB or DPA exempt
- Already Enc Amount: Cumulative total of encumbrances for the Supplier per business unit and fiscal year. The amount displayed here is pulled from the threshold status table in the OAKS Financial and is subject to the CB/DPA thresholds
- Already Vchred Amount: Cumulative total of vouchers for the Supplier per business unit and fiscal year. The amount displayed here is pulled from the threshold status table in the OAKS Financial and is subject to the CB/DPA thresholds
- Total Enc After Last Job: Cumulative total of encumbrances subject to CB/DPA as of the last time the PO dispatch job ran in OAKS
- Total Amount for CB Control: Current PR amount plus total encumbered and vouchered amounts. The amount displayed here is pulled from the threshold status table in the OAKS Financial and is subject to the CB/DPA thresholds
- CB Balance: CB threshold balance remaining (if negative, threshold has been exceeded)
- DPA Balance: DPA threshold balance remaining (if negative, threshold has been exceeded)
- Amount Exempt – Accounts: The amount per line item that is exempt based on the 'Exempt Accounts' column below.
- Exempt Accounts: The chart of account codes will be listed that generate the amount on the line item in the 'Amount Exempt – Accounts' column above.
- Amount Exempt – Departments: The amount per line item that is exempt based on the 'Exempt Departments' column below.
- Exempt Departments: The departments will be listed that generate the amount on the line item in the 'Amount Exempt – Departments' column above.
- Amount Exempt – Contracts: The amount per line item that is exempt based on the 'Exempt Contracts' column below.
- Exempt Contracts: The contracts will be listed that generate the amount on the line item in the 'Amount Exempt – Contracts' column above.
- Encumbered POs: N/A
- POs after last job: Lists PO IDs that have been encumbered since last job run with OAKS (this is basically saying for this business unit, with this supplier, POs have counted against your DPA threshold)

▲ Upon the completion of the Agency Final Approver workflow step, the Controlling Board tab will change to "Final Data", which will be used as the final CB/DPA validation within the PR workflow before a purchase order is created.