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

Key:
- Agency
- DAS
- Requisite Agency

* 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.
SUBMITTING PURCHASE REQUISITIONS

Topics

• Manage Profile Settings
• Purchase Requisition Item Types
• Purchasing Services in Ohio|Buys
• Submit a Hosted Catalog Purchase Requisitions
• Submit a Punchout Catalog Purchase Requisition
• Submit a Freeform Purchase Requisition
• Review and Update a Purchase Requisition
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.

3. 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.

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

a) 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.

b) The User column shows the name of the user that occupies in the role.

c) 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.
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:

a) Select the name of another user in the **Give my approval workflow tasks to** field.

b) Select a date to start delegating tasks in the **From** field.

c) Select a date to stop delegating tasks in the **To** field. If the delegation is supposed to occur indefinitely, then leave this field blank.

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

In addition, please note that the Delivery Date field for a line item will not be shown if the Product Type is changed from Product to Services.
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
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 search for goods and services. Enter search terms and then click Search. You can also search using additional filters such as Manufacturer Part Number, Supplier, or State Contract Number by clicking the More Filters (▼) icon.

By default, the search results on the Browse Items page are filtered to only show items that contain an item tag. An items 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.

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.

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.

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

a) 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”).

b) 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.

c) 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.

d) 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.

e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these users will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).

f) Click **Save**.
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.

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.

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.

Click the Save button.
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.

To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

1) Click the Pencil (✍️) icon next to one of the items to open it.

2) Select the Order Supplier and Supplier Contact.

3) If desired, select/update the Delivery Date and populate the Attn field.
Step-by-Step Instructions for Submitting a Goods and/or Services Request

3) Click **Save**. You must save these changes before applying the updates to all line items in the order.

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

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

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**.

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.

▲ A Requester cannot update a purchase requisition once it has been submitted unless the purchase requisition is rejected back to them. If you need to make updates after submitting a purchase requisition, add your requested changes in the Comment section on the **Workflow** tab and a Requisitioner can make updates on your behalf as they complete their review.

▲ 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 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
Submit a Pcard Purchase Requisition

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. You can also search using additional filters such as Manufacturer Part Number, Supplier, or State Contract Number by clicking the More Filters ((filters) icon.

▲ 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.

▲ 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.

2. To begin the checkout process, click the Checkout icon.

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

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

1. **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”).

2. **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.

3. 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.

4. 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.

5. If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these users will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).

6. Click **Save**.

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

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. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.

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.

9. 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, chartfield 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.

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.
To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

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

2) Select the **Order Supplier** and **Supplier Contact**.

3) If desired, select/update the **Delivery Date** and populate the **Attn** field.

4) Click **Save**. You must save these changes before applying the updates to all line items in the order.

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

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.
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.

▲ To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header.
When reviewing the Chart of Account Values table, please note that:

<table>
<thead>
<tr>
<th>#</th>
<th>ID</th>
<th>Fund Code</th>
<th>Account</th>
<th>ALI</th>
<th>Department</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>4264-1</td>
<td>12.022</td>
<td>GRF</td>
<td>521081</td>
<td>130321</td>
<td>DAS101110</td>
<td>3950C</td>
</tr>
<tr>
<td>4264-1</td>
<td>12.027</td>
<td>GRF</td>
<td>521081</td>
<td>130321</td>
<td>DAS101210</td>
<td>1001B</td>
</tr>
</tbody>
</table>

a) The # column will correspond to the # column in the Items grid denoting different line items.

b) The ID column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.
Submit a Pcard Purchase Requisition

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.

![Browse Items page](image)

▲ To filter your search by other categories, you can also search using additional filters such as Manufacturer Part Number, Supplier, or State Contract Number by clicking the More Filters (▼) icon and applying your filters in the appropriate fields.

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.
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.

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).

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.

- **a)** 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”).

- **b)** 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.

- **c)** 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.

- **d)** 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.

- **e)** 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).

- **f)** Click **Save**.

  ▲ 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. In order to do this, you must first select your **Organization** and then click **Save**. Requisitioners will only be able to select users that are within their scope.
Submit a Hosted Catalog Purchase Requisition

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.

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. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.

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.

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.
Submit a Hosted Catalog Purchase Requisition

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:

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.

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.
To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

1) Click the Pencil (✏️) icon next to one of the items to open it.

2) Select the **Order Supplier** and **Supplier Contact**.

3) If desired, select/update the **Delivery Date** and populate the **Attn** field.

4) Click **Save**. You must save these changes before applying the updates to all line items in the order.

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

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.
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.

▲ To edit a single field in a chartfield string, begin typing the information you want to use to populate it. Select the appropriate code once it appears in the drop-down menu. You can also search for additional options by clicking **See All**.

▲ 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.

▲ To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header.
When reviewing the Chart of Account Values table, please note that:

- The # column will correspond to the # column in the Items grid denoting different line items.
- The ID column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.

**Chart of Account Values**

<table>
<thead>
<tr>
<th>#</th>
<th>ID</th>
<th>Fund Code</th>
<th>Account</th>
<th>ALI</th>
<th>Department</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>4264-1</td>
<td>12.022</td>
<td>GRF</td>
<td>521081</td>
<td>130321</td>
<td>DAS101110</td>
<td>3950C</td>
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<td>12.027</td>
<td>GRF</td>
<td>521081</td>
<td>130321</td>
<td>DAS101210</td>
<td>1001B</td>
</tr>
</tbody>
</table>

**Items**

- Click on the # column to select the line item.

**Budget Information**

- Select the ID and Fund Code to allocate funds.
Once you are done making updates to the line item’s information, click **Save & Close**.

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.

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.

▲ 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
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. 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** ((sideways triangle)) icon and select the **Punchout only** checkbox.

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.

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.

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

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.

![Diagram of Punchout Catalog Purchase Requisition]

a) 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”).

b) 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.

c) 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.

d) 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.

e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these users will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).

f) Click **Save**.

⚠ 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. In order to do this, you must first select your **Organization** and then click **Save**. Requisitioners will only be able to select users that are within their scope.
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. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.

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.

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.
Submit a Punchout Catalog Purchase Requisition

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

9  Click the **Save** button.

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.

10 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:

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.

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.
To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

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

2) Select the **Order Supplier** and **Supplier Contact**.

3) If desired, select/update the **Delivery Date** and populate the **Attn** field.

4) Click **Save**. You must save these changes before applying the updates to all line items in the order.

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

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.
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.

- To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header.
Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

When reviewing the Chart of Account Values table, please note that:

a) The # column will correspond to the # column in the Items grid denoting different line items.

b) The ID column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.
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.

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.

▲ To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

▲ 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
Submit a Freeform Purchase Requisition

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.

3. If you are unable to find what you are looking for in Ohio|Buys or if the contract you are ordering from does not have a price list, you can create a freeform line item. Click Add Non-Catalog Item.

▲ Some contracts in Ohio|Buys do not have a price list associated with them. If this is the case, you will need to add freeform line items to a purchase requisition in order to purchase from that contract. In addition, as a reminder, you can see if a contract has a price list in Ohio|Buys by opening a contract from the Browse Contracts page and navigating to the Price List tab. If the Price List tab does not contain any items, then you will need to add freeform line items to a purchase requisition in order to purchase from that contract.
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) Select the **Product type** (e.g., Product or Services).

e) 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

f) Select the **Delivery Date** (or date range for Services).
   ▲ In addition, please note that the Delivery Date field for a line item will disappear if the Product types is changed from Product to Services.
Complete the following fields in the Select Supplier section:

a) 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.

b) Select the applicable Supplier Contact, though not required.

c) Select the Supplier Location according to the Supplier’s preferences in OAKS. 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:

a) Enter a detailed description of why you are requesting a freeform item in the Internal Comments field.

b) Enter any comments for the Supplier in the Comment field as needed and attach any Supplier facing documents using the Attachments button.

c) If you are purchasing from a contract that does not have a price list, be sure to enter and select the associated contract on the Contract field.

d) Click Save & Close.
The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

a) 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”).

b) 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.

c) 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.

d) 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.

e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these users will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).

f) Click **Save**.

⚠ 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. In order to do this, you must first select your **Organization** and then click **Save**. Requisitioners will only be able to select users that are within their scope.
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. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.

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.

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.
Click the Save button.

12 ▲ 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 (_edit) 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:

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.

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.
To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

1) Click the Pencil (✏️) icon next to one of the items to open it.

2) Select the Order Supplier and Supplier Contact.

3) If desired, select/update the Delivery Date and populate the Attn field.

4) Click Save. You must save these changes before applying the updates to all line items in the order.

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

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.
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.

▲ To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header.
Step-by-Step Instructions for Submitting a Hosted Catalog

When reviewing the Chart of Account Values table, please note that:

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<thead>
<tr>
<th>#</th>
<th>ID</th>
<th>Fund Code</th>
<th>Account</th>
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<th>Department</th>
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</tr>
</thead>
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<td>DAS101210</td>
<td>1001B</td>
</tr>
</tbody>
</table>

2 Result(s)

a) The # column will correspond to the # column in the Items grid denoting different line items.

b) The ID column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.

Submit a Freeform Purchase Requisition
Submit a Freeform Purchase Requisition

Step-by-Step Instructions for Submitting a Hosted Catalog

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

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.

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.

▲ 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 Sourcing Details for a Purchase Requisition
Multiple Agency Approvers

Some agencies have chosen to implement multiple agency approvers at certain steps of the PR approval workflow. For example, an agency can choose to assign multiple users to an Agency Fiscal Approver rule (e.g., order 10), and with these multiple approvals enabled, all users will need to approve a PR before it advances to the next level (i.e., order 20) of that Agency Fiscal Approval rule.

When does a step require multiple approvals?

The simplest way to determine whether or not multiple approvers will be required at a step is to navigate to the Workflow tab of the PR and locate the current position in the workflow. As a reminder, the current step of the workflow is highlighted in Orange while completed workflow steps are highlighted in Green.

Steps where multiple approvers will be required will have the suffix “(all)” at the end of the step name. In the example below, we can see that the Agency Procurement Approver step includes the suffix, while the Agency Fiscal Approver step does not.

In this case, multiple users were required to approve the PR at the Agency Procurement Approver step, however only one of the possible Agency Fiscal Approvers will need to approve the PR to advance in the workflow.

Users can also confirm whether multiple approvals will be required by navigating to the Approval History table at the bottom of the Workflow tab. Like the workflow, steps with the suffix “(all)” will require every assigned approver to approve, whereas steps without the suffix require just one approval. For more information on your agency’s approval workflow, please consult with your Agency Admin.
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

1. ▲ 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.

   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.

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

   ▲ 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.
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**

- **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 Submitting a Hosted Catalog Pcard Purchase

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.

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.
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.

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**Review and Update a Purchase Requisition**

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.

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**).

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

- **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.

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
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.

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.

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.
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.

⚠️ 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.
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 Additional Agency 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.

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.

▲ 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.
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
Approve a Purchase Requisition  
(Agency Procurement Approver)

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:

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.
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.

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.
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
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. 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.

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

- 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.

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

Here are the Origin Codes available:

- 201 - BWC VIP Processing
- 202 - BWC VIS Processing
- 203 - BWC Voucher Processing
- 204 - BWC Tuition Reimbursement
- 205 - BWC OSS Voucher Processing
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.

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.

**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.

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.

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

▲ For more information on applying speed charts, please refer to the **Applying Speed Charts** Job Aid.

Scroll to the bottom of the line item page and click **Budget Information**.
Add or update the chartfield information as appropriate.

a. Use the **Allocation** to create additional chartfield strings for this line item.
b. 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**.

c. 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.
d. 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.)
▲ To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header.
When reviewing the Chart of Account Values table, please note that:

a) The # column will correspond to the # column in the Items grid denoting different line items.

b) The ID column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.
After updating the chartfield information and Supplier Location fields as necessary, click the **Save & Close** button.

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.

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.

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.

▲ 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.
REVIEW SOURCING DETAILS FOR A PURCHASE REQUISITION

Overview

• **What’s Covered**: This section discusses the process of reviewing a Quick Quote that is associated with a purchase requisition
• **Roles**: Agency Procurement Approver, Agency Fiscal Approver, Agency Final Approver
• **Used When**: Reviewing a purchase requisition containing items that required a Quick Quote solicitation
Step-by-Step Instructions for Submitting a Hosted Catalog

You can access pricing information that was the result of a quick quote or other type of solicitation directly from the requisition. Please note that the process for accessing, approving or rejecting the purchase requisition remains unchanged.

If the quick quote has been performed incorrectly (e.g., less than three responses, the lowest price was not selected without adequate justification, etc.) please reject the purchase requisition and instruct the Requisitioner to redo the quick quote.

In order to review a quick quote, you will need to be included on the sourcing project team. If you are unable to access the quick quote please reach out to the user responsible for the solicitation and ask them to add you to the project team as an SME or Contributor. For more information on sourcing project roles, please consult the Creating Managing and Awarding Solicitations Learner Guide.

To access a quick quote associated with a purchase requisition, scroll to the bottom of the purchase requisition to review the line item details. Click on the **Sourcing** hyperlink at the bottom right-hand corner of the page.

Navigate to the **Analyze and Award** tab of the solicitation.

Select the **Awarding** header within the Analyze & Award tab.
Scroll down to review Supplier responses and the **Award Justification**. The response highlighted in green is the lowest-cost response. A **green check (✓)** next to a response indicates that proposal was selected.

### Award Justification

- Award Justification: Best Value Selected
- Award Explanation: Lowest cost responsible responsive bidder awarded.

a) If you need to review the proposals individually in more detail, navigate to the **Proposals** header in the Analyze & Award tab.

b) To open a response, click on the associated **Proposal** hyperlink.

c) Navigate to the **Item** tab to view the details of the Supplier's proposal for the requested item.

To return to the original purchase requisition, click the **X (✗)** icon.

▲ For more information on quick quotes, please consult the Quick Quoting in Ohio|Buys Learner Guide
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.
- **Used When**: An approver needs to obtain an additional, or alternative sign-off on 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.

- 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.

▲ 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
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.

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.

2. 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.
b) If the purchase requisition is in a status of Ordered, click **Duplicate**. Click **OK** to confirm.

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 cancelation. 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.

2. **If a purchase requisition is canceled/deleted, you should not attempt to re-open it as this will result in POs that fall into budget error.** If you want to replicate a requisition that was canceled/deleted, please use the “Duplicate” functionality. This will create a new requisition ID and auto-populate the Budget Date to today’s date.

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

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.

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.
PURCHASE REQUISITION FIELD GUIDE
<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Agency Approvers</td>
<td>Expands when selected to display a field where users can indicate any Additional Agency Approvers for that purchase requisition. Note that only users with the Additional Agency Approver role may be selected in this field.</td>
<td></td>
</tr>
<tr>
<td>Attachments - Internal, Supplier, and Justification</td>
<td>Expands when selected to display a button where users can upload attachments for both internal use and Suppliers. Most file formats are supported.</td>
<td></td>
</tr>
<tr>
<td>Attn</td>
<td>The person who will be responsible for receiving the items in the purchase requisition</td>
<td>Also available at line item level</td>
</tr>
<tr>
<td>Bill to</td>
<td>The address to which the Supplier will bill for the purchase requisition</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Budget Date</td>
<td>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. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Business Unit</td>
<td>The Business Unit that the purchase requisition is for, usually the Requester’s agency</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Chart of Account Values</td>
<td>Expands to display all COA strings used on the purchase requisition</td>
<td></td>
</tr>
<tr>
<td>Comments to Supplier</td>
<td>A free text entry field where users can input comments that will be visible to the Supplier</td>
<td>Also available at line item level</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>The fiscal year that the purchase requisition falls under, populates automatically based on the Budget Date after the purchase requisition is saved</td>
<td>Non-editable</td>
</tr>
<tr>
<td>Organization</td>
<td>The division or site that the purchase requisition is for</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Organization Structure</td>
<td>Expands when selected to display more information about the organization that the purchase requisition is for</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Origin Code</td>
<td>A code used in vouchering to drive the approval workflow, can be entered by any user but must be entered by Fiscal Approver step</td>
<td>Mandatory field (Fiscal Approver)</td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td><strong>Purchasing Options</strong></td>
<td>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</td>
<td></td>
</tr>
<tr>
<td><strong>Receiving Required</strong></td>
<td>Indicates whether receiving within Ohio</td>
<td>Buys will is required in order to process any invoices on the purchase requisition, defaults to No</td>
</tr>
<tr>
<td><strong>Request Description</strong></td>
<td>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)</td>
<td></td>
</tr>
<tr>
<td><strong>Requester</strong></td>
<td>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</td>
<td></td>
</tr>
<tr>
<td><strong>Requisition ID</strong></td>
<td>An automatically assigned ID number that can be used to find the requisition</td>
<td>Non-editable</td>
</tr>
<tr>
<td><strong>Requisition Label</strong></td>
<td>The name of the requisition in Ohio</td>
<td>Buys</td>
</tr>
<tr>
<td><strong>Ship To</strong></td>
<td>The address to which the Supplier will ship the purchase assuming that all items are going to the same location</td>
<td>Mandatory field, Also available at line item level</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The status of the purchase requisition which updates automatically, some common statuses include: Draft, Initialized, and Ordered</td>
<td>Non-editable</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>A selector where users can indicate that a requisition is either Standard, After the Fact, or a Blanket/Encumbrance Order</td>
<td>Mandatory Field</td>
</tr>
</tbody>
</table>
### Requisition Field Guide: Requisition Header Item View

#### Items

<table>
<thead>
<tr>
<th>Add a line</th>
<th>Delete Lines</th>
<th>Copy Selected Lines</th>
<th>Edit Lines</th>
</tr>
</thead>
</table>

- **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

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Additional Info</th>
</tr>
</thead>
</table>
| 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

- **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
### Purchase Requisition Tabs

<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Requisition</td>
<td>In this tab, users can view and edit most of the details about a purchase requisition including the and line items</td>
<td></td>
</tr>
<tr>
<td>Term</td>
<td>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)</td>
<td></td>
</tr>
<tr>
<td>Workflow</td>
<td>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</td>
<td></td>
</tr>
<tr>
<td>Pcard</td>
<td>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</td>
<td></td>
</tr>
<tr>
<td>Controlling Board</td>
<td>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</td>
<td></td>
</tr>
<tr>
<td>IT Review</td>
<td>If the purchase requisition requires IT approval, the comments from those approvers will be displayed here</td>
<td></td>
</tr>
<tr>
<td>Release &amp; Permit</td>
<td>If the purchase requisition requires a Release &amp; Permit, the Release and Permit information will automatically populate here once it has been granted</td>
<td></td>
</tr>
<tr>
<td>Requisite Program</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Commodity</td>
<td>The commodity code associated with the line item</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Continuation?</td>
<td>Click Yes if this is a continuation of a previous order, else leave as No</td>
<td></td>
</tr>
<tr>
<td>Controlling Board Number</td>
<td>If a controlling board number needs to be applied to a purchase requisition, it will populate here</td>
<td></td>
</tr>
<tr>
<td>Dealers Available Slider</td>
<td>If there are dealers available for this line item, this slider will automatically engage (indicates a quick quote must be performed)</td>
<td></td>
</tr>
<tr>
<td>Delivery Date</td>
<td>The requested delivery date for the line item (must be set by the user)</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>ID</td>
<td>A unique ID is assigned to each line of every purchase requisition</td>
<td>Non-editable</td>
</tr>
<tr>
<td>Item Code</td>
<td>The unique code assigned to an item by its Supplier (applies only to hosted catalog items)</td>
<td>Non-editable</td>
</tr>
<tr>
<td>MBE Set Aside Drop-Down</td>
<td>Click to select if the item is MBE or EDGE compliant</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>The name of the line item</td>
<td>Only editable for freeform items</td>
</tr>
<tr>
<td>Order Supplier</td>
<td>The specific location of the Supplier that will fulfill the purchase requisition</td>
<td></td>
</tr>
<tr>
<td>Ordered Quantity</td>
<td>The quantity of items ordered, can be modified to be measured in different ways such (e.g. each, box, bag etc.)</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Product Code</td>
<td>A unique value provided by some Suppliers in their catalogs</td>
<td>Non-editable</td>
</tr>
<tr>
<td>Products Types</td>
<td>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</td>
<td>B Buys)</td>
</tr>
<tr>
<td>Profile ID</td>
<td>Used for asset management</td>
<td>Non-editable</td>
</tr>
<tr>
<td>Supplier</td>
<td>The Supplier for the line item</td>
<td></td>
</tr>
<tr>
<td>Supplier Contact</td>
<td>The primary point of contact for the line item, Supplier Contacts are determined at the Order Supplier level</td>
<td></td>
</tr>
<tr>
<td>Supplier Location</td>
<td>How the Supplier is paid, defaults to the Supplier’s preference in OAKS</td>
<td></td>
</tr>
<tr>
<td>Use Non-Default Supplier Location</td>
<td>Click if you are using a Supplier location other than the default in OAKS</td>
<td></td>
</tr>
</tbody>
</table>
Requisition Field Guide: Line Item (2/2)

### 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) | Non-editable, updates based on price and quantity
---

**Total Amount** | The total cost of the line items |
## Version Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Publish Date</th>
<th>Summary of Updates</th>
<th>Pages Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td></td>
<td>Initial draft</td>
<td>All</td>
</tr>
<tr>
<td>2.0</td>
<td></td>
<td>Updated Pcard process</td>
<td>All</td>
</tr>
<tr>
<td>3.0</td>
<td>6/15/2020</td>
<td>Updated Receiving Required and Additional Agency Approvers</td>
<td>27, 33, 42, 50, 60, 74</td>
</tr>
<tr>
<td>4.0</td>
<td>7/24/20</td>
<td>Updates related to Release 2 Sprint 7</td>
<td>43, 52, 61, 79, 98</td>
</tr>
<tr>
<td>5.0</td>
<td>8/6/20</td>
<td>Updates related to Release 2 Sprint 8</td>
<td>72, 83, 94</td>
</tr>
<tr>
<td>6.0</td>
<td>8/21/20</td>
<td>Added after the fact purchase requisition clarification</td>
<td>32</td>
</tr>
<tr>
<td>6.1</td>
<td>9/3/2020</td>
<td>Added details on how to copy allocation lines</td>
<td>88</td>
</tr>
<tr>
<td>6.2</td>
<td>1/6/2021</td>
<td>Fixed a misspelling</td>
<td>62</td>
</tr>
<tr>
<td>6.3</td>
<td>2/3/2021</td>
<td>Added Review a Solicitation JA for Approvers</td>
<td>92-94</td>
</tr>
<tr>
<td>6.4</td>
<td>3/1/2021</td>
<td>Added language about filtering by Supplier or Contract Number. Updated language on Chartfields based on State Requests</td>
<td>26, 32, 48</td>
</tr>
<tr>
<td>6.5</td>
<td>3/15/2021</td>
<td>Added language for Product Reference Codes being added to the Advanced Filter from the Browse Items page.</td>
<td>8, 9, 26, 32, 41</td>
</tr>
<tr>
<td>6.6</td>
<td>5/10/2021</td>
<td>Added clarification on Budget Date</td>
<td>34, 44, 54, 64, 105</td>
</tr>
</tbody>
</table>
## Version Control

<table>
<thead>
<tr>
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<th>Pages Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.7</td>
<td>5/25/2021</td>
<td>Added reference to new Chart of Account Values section on PR Header, also noted the field in the Field Guide</td>
<td>38-39, 49-50, 59-60, 71-72, 92-93, 110-111</td>
</tr>
<tr>
<td>6.8</td>
<td>6/6/2021</td>
<td>Added Manufacturer Part Number field to search pages. Updated Apply Order Supplier/Contact to All Line Items button to explain how this button will also apply the selected Delivery Date and Attn fields to all line items</td>
<td>26, 29-30, 32, 36, 42, 47, 57, 69</td>
</tr>
<tr>
<td>7.0</td>
<td>6/14/2021</td>
<td>Removed General Navigation content. Added details on how and when to associate a contract with a freeform line item</td>
<td>50, 52</td>
</tr>
<tr>
<td>7.1</td>
<td>7/6/2021</td>
<td>Updates for On Behalf Of Process. New page on multiple agency approvals. Added a note stating the Delivery Date field will not be shown if the Product Type= Services</td>
<td>11, 31, 41, 51, 53, 62</td>
</tr>
<tr>
<td>7.2</td>
<td>7/21/2021</td>
<td>Noted Requesters cannot edit a PR once it’s been submitted. Explained users should not re-open canceled/deleted PRs</td>
<td>17, 95</td>
</tr>
</tbody>
</table>