How to Submit a Punch-Out Catalog Purchase Requisition

Step-by-Step Instructions for Submitting a Punch-Out Catalog Purchase Requisition

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

2. The Browse Items page is displayed. To quickly find a Supplier's punch-out 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 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. Punch-out 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 punch-out catalog.

△ Hosted and punch-out catalog items’ prices may change as updates are reviewed and approved by Contract Analysts. In some scenarios (e.g., items ordered from GBEX), punch-out catalog item pricing may change at any time without approval of a Contract Analyst unless the item is a Market Basket Item. Market Basket Items are listed in a contract’s terms and maintain firm pricing for one year from the contract’s inception.

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

5. The items from the Supplier’s punch-out catalog have been added to your shopping cart. To begin the checkout process, click Checkout.
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The checkout page is displayed*. Any fields with a red asterisk indicate a mandatory field that must be completed.

a) 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.

b) Select the requisition’s **Ship To** address. If you cannot find the shipping address, click the ‘+’ icon to provide a one-time delivery address.

c) If you would like to add additional details, click **Pcard & Advanced Options**. Most Requesters can click **Submit Requisition** at this point unless they would like to add a Pcard.

*Requester’s will be taken to the basic checkout page and Requisitioners will see the advanced checkout page displaying all requisition information on the header and line levels.

From this page, you can provide additional details for your purchase requisition.

a) If you would like to make this purchase a Pcard purchase, click the **Pcard Purchase** radio button. You must have your Pcard added to your profile in order to complete a Pcard purchase.

b) Select whether receiving is required in Ohio Buys.

c) Update the **Requisition Label** with a description of what the purchase requisition is for.

d) 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.
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<th>Step</th>
<th>Instruction</th>
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<tr>
<td>a)</td>
<td>Select the <strong>Budget Date</strong>. The relevant fiscal year will populate in the <strong>Fiscal Year</strong> field.</td>
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<tr>
<td>b)</td>
<td>Select the <strong>Origin Code</strong> based on the agency you’re purchasing for.</td>
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<tr>
<td>c)</td>
<td>Expand the <strong>Purchasing Options</strong> section. From this section, you can indicate if a <strong>DAS sourcing event</strong> is required, as well as if the purchase requisition is <strong>Single Source</strong> or <strong>Sole Source</strong>. In addition, you can also note if the purchase requisition should be put on hold, and/or if it should not be encumbered.</td>
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<tr>
<td>d)</td>
<td>Use the displayed radio buttons to make your selections. If you select that a <strong>DAS sourcing event</strong> is required, click the <strong>Request DAS to Source</strong> button to complete the associated request form, which will then be routed to DAS. Please refer to the <strong>Submit a Request for Solicitation Job Aid</strong> for step-by-step instructions on how to complete this request form.</td>
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On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level.
10 Click the Save button.

11 ▲ 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 (-pencil) icon next to each line item to make your mandatory and/or optional additions to specific fields (e.g., supplier contact, ordered quantity, chartfield information, etc.).

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

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 then click the **Edit Lines** button.

b) To update the **Supplier Contact**, first select your Supplier from the **Supplier** field. Next, select the Supplier Contact from the associated drop-down menu. Please note, the Supplier Contact field is not mandatory and some Suppliers may not have a contact.

c) Click the **Add Circle** icon or **Replace Circle** icon for each of the fields you updated.

d) Click **Save & Close**.
When reviewing the line item details for an individual line item, you can update information in the following sections:

a) **Describe the Item**: contains the **Ordered Quantity** and **Delivery Date** fields.

b) **Select Supplier**: In some scenarios, you will need to select a Supplier Contact if the Supplier has multiple order contacts listed on their profile.

c) **Pricing**: You are able to adjust the price for hosted and punch-out catalog items, as needed. Whenever you do adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a supplier 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* for step-by-step 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 you previously would have provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information - this information can be updated until a Fiscal Agency Approver completes their review.

▲ Prior to entering any chartfield information, it is recommended you right-click on any of the column headers to customize which columns are displayed.
Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

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

14. 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**.

▲ 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 Creating and Awarding Quick Quotes course 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.

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

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