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 **Receiver's Site Location**, which is the site you regularly submit requisitions for.

   c) 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.

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

   e) 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 manage email notifications, navigate to the **User Preferences** tab, and de-select the notifications in the **Subscription** section.

▲ To disable the notifications related to pending approval tasks, deselect the option for *Ohio|Buys: (act_label_subject) Validation Pending for (process_label_subject)*. This option will disable all notifications.

▲ Alternatively, users can set up a special folder to sort all Ohio Buys emails within their Outlook inbox by following the steps below.

a) Create a New Folder to store the emails by clicking **New folder** in the left hand pane and name it “Ohio Buys.”
b) Click the Settings (⚙️) icon then click view all Outlook settings.

c) Click Rules.
d) Click **+ Add new rule.**

![Image of Manage Profile Settings interface]

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

![Image of Manage Profile Settings interface with rule settings opened]
To review information related to the approval chain, such as the Immediate Supervisor and Chief Information Officer, leverage the Approval Escalation section on the User Preferences tab. The roles assigned to these users influence the approval workflow routing.

<table>
<thead>
<tr>
<th>Role</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIO</td>
<td>Rodgers Ervan</td>
</tr>
<tr>
<td>DAS CPO</td>
<td>Sanders Kelly</td>
</tr>
<tr>
<td>DAS Director</td>
<td>Damschroder Matthew</td>
</tr>
<tr>
<td>DCPO</td>
<td>Herrel Angeline</td>
</tr>
<tr>
<td>DCPO</td>
<td>Sanders Kelly</td>
</tr>
</tbody>
</table>

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 sits 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 a user is out of the office for an extended period of time, that user’s 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, in addition to the original user.

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.

*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).*