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

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

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

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

- Threshold Limit: State of OH CB limit
- PR Amount Not Exempt: Amount of the PR that is not CB or DPA exempt
Step-by-Step Instructions for Viewing Controlling Board and Direct Purchase Authority Calculations

- Total Amount Exempt: Amount of the PR that is CB or DPA exempt
- Already Enc Amount: Cumulative total of encumbrances for the Supplier per business unit and fiscal year. The amount displayed here is pulled from the threshold status table in the OAKS Financial and is subject to the CB/DPA thresholds
- Already Vchred Amount: Cumulative total of vouchers for the Supplier per business unit and fiscal year. The amount displayed here is pulled from the threshold status table in the OAKS Financial and is subject to the CB/DPA thresholds
- Total Enc After Last Job: Cumulative total of encumbrances subject to CB/DPA as of the last time the PO dispatch job ran in OAKS
- Total Amount for CB Control: Current PR amount plus total encumbered and vouchered amounts. The amount displayed here is pulled from the threshold status table in the OAKS Financial and is subject to the CB/DPA thresholds
- CB Balance: CB threshold balance remaining (if negative, threshold has been exceeded)
- DPA Balance: DPA threshold balance remaining (if negative, threshold has been exceeded)

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