Log in to Ohio Buys. The My Pending Validations window on the Ohio Buys homepage shows your 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**.

### Step 2

Review the header of the PR to see if a Pcard is being used.

**a.** You can choose to change a purchase requisition to a Pcard purchase by using the **Pcard Purchase** selector. If you do so, scroll to the right and ensure that the Bill To: address is 30 E. Broad Street, 34th Flr., Columbus, Ohio 43215, update to this address if required.

**b.** You can also change the Pcard attached to the Purchase Requisition by clicking on the **Pcard** tab. You cannot see the Requester’s Pcard information, however you can apply your own Pcard if desired.

### Step 3

In the Header section, review and/or select the appropriate **Origin Code** for the purchase requisition from the drop-down menu.
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

In the Header section, click **Purchasing Options** and use the radio button to determine whether or not to encumber the order.

▲ Usually, if a PR is a Pcard purchase, Do Not Encumber should be selected. If you want to encumber a Pcard order, ensure that the unit of measure of each line item is set to AMT. If it is not, reject the PR with instructions to the Requisitioner to make this change.

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.

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 **05.02.16 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. The amount of each chartfield string is displayed in a text entry field. You can allocate a line item to multiple chartfield strings.
c. You can allocate line items by percentage or by amount.
d. The chartfield information you enter is the same as what you 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. When an ISTV Xref is provided, an ISTV account code must be listed in the Account field.
▲ 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 edit which chartfields are displayed at any time, right-click any of the column headers to open a list of columns and radio buttons. From this menu you can select which columns are displayed in the chartfields grid as well as drag and drop the order in which they are displayed. After you make updates, click Apply as global configuration, and they will be saved to your profile.
9 Scroll to the right side of the line item page. Update the **Supplier Location** field using the drop-down menu as appropriate.

▲ The options for the Supplier Location field will be the same options available in OAKS.

10 After updating the chartfield information and Supplier Location fields as necessary, click the **Save & Close** button.

11 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 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 PR 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.

*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).*