Step-by-Step Instructions for Submitting a Hosted Catalog

After a Request to Purchase (RTP) has been submitted, it is automatically routed for Agency Approval (as needed), Requisite Procurement Program review (as needed) and subsequent DAS review.

▲ **Agency Approver:** To approve as an Agency Approver refer to steps 1-3.
▲ **Requisite Review:** To approve as a Requisite Approver refer to steps 4-6.
▲ **DAS Review:** To approve as a DAS Procurement Manager, refer to steps 7-10.
▲ **Complete Sourcing Event:** To approve after conducting the associated solicitation for an RTP, refer to steps 11-13.

### Agency Approver:
To view all items pending approval, log in to Ohio|Buys. Under **My Pending Validations**, click the object hyperlink next to the request that has an **Activity** of “Agency Approver”.

Review the details of the RTP. Make any updates as needed.
How to Review a Request to Purchase

Step-by-Step Instructions for Reviewing a Request to Purchase (Agency Approver)

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▲ If you would like to add any comments and/or attachments to the RTP, navigate to the Workflow tab and use the Add a comment section to add comments and send a notification to the desired user. To do this, enter comments in the Comment field, select the desired user from the Send to drop-down menu, and then click Save.

If the request is valid, click Approve. If the request is not a valid request, click Reject. You will be required to enter comments whenever a request is rejected. These comments will then be emailed to the user who submitted the request.

Requisite Review:
To view all items pending approval, log in to Ohio|Buys. Under My Pending Validations, click the object hyperlink next to the request that has an Activity of “Requisite Review.”
How to Review a Request to Purchase

Step-by-Step Instructions for Reviewing a Request to Purchase (Requisite)

Review the details of the request. If a Requisite Procurement Program can fulfill the submitting user’s request, the user is required to make the purchase from that Requisite Procurement Program regardless of the purchase amount.

▲ If you would like to add any comments and/or attachments to the Request to Purchase, navigate to the Workflow tab and use the Add a comment section to add comments and send a notification to the desired user. To do this, enter comments in the Comment field, select the desired user from the Send to drop-down menu, and then click Save.

If the request for a Requisite Program waiver is justified, select the Waiver Granted button.

A pop up will appear confirming that you will not be providing the goods requested. Click Ok.

If your organization will provide the goods/services in question, select the Waiver Denied button.

▲ For State Printing requests where State Printing will be responsible for the solicitation, the State Printing to Source slider must be engaged prior to clicking Waiver Denied.

▲ This slider is only editable by Printing Procurement Managers.
a) After a RTP has been reviewed by the Requisite Procurement Program approver, it will be routed back to the Requester for review if the waiver was denied.

b) After a RTP has been reviewed by the Requisite Procurement Program approver, it will be routed for DAS review if the waiver was granted.

**DAS Review:**
To view all items pending approval, log in to Ohio|Buys. Under My Pending Validations, click the object hyperlink next to the request that requires your review.

Review the details of the Request to Purchase. Make updates as needed.
Based on your assessment of the RTP, complete the **Manager Recommendation** and **Resolution** fields:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Resulting Workflow Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>DAS to Solicit</td>
<td>Selected when a DAS Contract Analyst will run a solicitation on the behalf of an agency with the goal of completing either an Enterprise Contract, an Agency Specific Contract, a State Printing purchase, a Multi-Agency Contract, or a One Time Purchase for a RTP.</td>
<td>Complete Sourcing Event</td>
</tr>
<tr>
<td>DAS to negotiate contract</td>
<td>Selected when a DAS Contract Analyst will negotiate a contract on behalf of the agency.</td>
<td>Complete Sourcing Event</td>
</tr>
<tr>
<td>Released for OAKS payment</td>
<td>Selected when a RTP should be released for OAKS payment processing.</td>
<td>R&amp;P Auto Assign</td>
</tr>
<tr>
<td>Only (DPA Exceeded)</td>
<td>Selected when a purchase would cause the agency to exceed their direct purchase authority (DPA) with a supplier and an OAKS R&amp;P needs to be created.</td>
<td>R&amp;P Auto Assign</td>
</tr>
<tr>
<td>Cancel Request to Purchase</td>
<td>Selected when a RTP should be cancelled either due to error or if submitted when not required.</td>
<td>Cancel</td>
</tr>
<tr>
<td>Non-IT Release and Permit</td>
<td>Selected when a non-IT R&amp;P should be created for the RTP.</td>
<td>R&amp;P Auto Assign</td>
</tr>
<tr>
<td>Agency to utilize Direct Purchase Authority</td>
<td>Selected when an agency should use their DPA. When this option is selected, the RTP will move to the Complete step and the object creator should be assigned the request.</td>
<td>Complete</td>
</tr>
<tr>
<td>Add to existing Contract</td>
<td>Selected when a DAS Contract Analyst will add to an existing contract to accommodate an agency’s RTP.</td>
<td>Complete Sourcing Event</td>
</tr>
<tr>
<td>Complete – see comments on Workflow tab</td>
<td>Selected when a RTP will not result in a solicitation, contract, and/or R&amp;P. When this option is selected, comments should be added to the Workflow tab of the RTP.</td>
<td>Complete</td>
</tr>
<tr>
<td>IT Agency Released Solicitation</td>
<td>Selected when an IT solicitation should be completed by the agency who submitted the RTP.</td>
<td>Complete Sourcing Event</td>
</tr>
</tbody>
</table>
If an existing IT Release & Permit (R&P) should be associated with the RTP, select the corresponding IT R&P on the **Release and Permit** field. Users will only be able to select R&Ps that are valid and match both the listed agency and Supplier on the RTP.

Navigate to the **Workflow** tab and enter and select the name of the user that will be responsible for completing the RTP in the **Complete Sourcing Event** field.

Only users with the Contract Analyst or Procurement Manager profile will be available for selection.

A user must be selected here even if the RTP will not result in a solicitation/contract. If this is the case, please select your own name on the **Complete Sourcing Event** field. If the submitting agency is going to use their DPA to complete the request, select the creator of the RTP on the **Complete Sourcing Event** field.

If you would like to add any comments and/or attachments to the Request to Purchase, navigate to the **Workflow** tab and use the **Add a comment** section to add comments and send a notification to the desired user. To do this, enter comments in the **Comment** field, select the desired user from the **Send to** drop-down menu, and then click **Save**.

Click **Approve**.

Approvers can also reject by clicking **Reject**. Users will be required to enter a reason for the rejection.

Approvers can also cancel the RTP by clicking **Cancel**. Users will be required to enter a reason for the cancellation.

When action is taken at the DAS Review step of the workflow, the associated creator of the RTP is notified via email of the corresponding Resolution.

When a non-IT R&P is automatically assigned as part of the RTP workflow, the R&P that is generated will have an end date that is equal to the last day of the fiscal year referenced on the RTP. For example, if the RTP lists a fiscal year of 2023, the resulting R&P will have an end date of 6/30/2023. The corresponding R&P number will be visible on the Release & Permit field of the RTP.
Complete Sourcing Event:
After a RTP has been assigned to an analyst, the assigned analyst will receive an email notification and pending validation.

To view all items pending approval, log in to Ohio Buys. Under My Pending Validations, click the object hyperlink next to the request that requires your review.

Review the details of the Request to Purchase.
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1. If you are unable to complete the RTP and believe it was routed to the incorrect user, click the Forward button at the top of the page to forward the request to an additional user. Any Contract Analyst within your agency can be forwarded a RTP.

2. After completing the associated sourcing project and/or contract, make any necessary updates to the Resolution field (e.g., DAS to solicit – Enterprise Contract, Non-IT Release and Permit, Complete – see Comments on Workflow tab, etc.).

3. Click Complete.

4. The assigned user can also reject by clicking Reject. Users will be required to enter a reason for the rejection.

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).