

Step-by-Step Instructions for Managing State User Accounts

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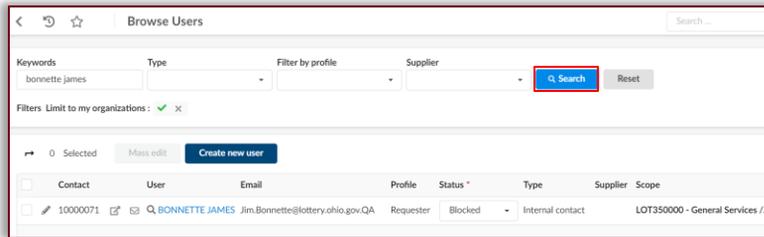
When a new employee joins and requires access to Ohio Buys, their information will be integrated into Ohio Buys directly from HCM.

- ▲ The employee’s record will come over in a Blocked status and will only have the Requester profile assigned by default.
- ▲ A new user will not have access to Ohio Buys via single sign-on if their account has not been enabled as part of the onboarding process.

To enable the new user, log in to Ohio Buys. Click on the **Admin** header from the Main Menu Navigation bar and select **Browse Users** from the associated drop-down menu.

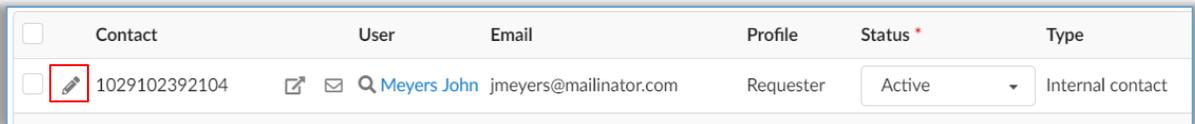
2

Remove the status filter for Active in the **Filters** section. Enter the last name of the user in the **Keywords** field and then click **Search**.



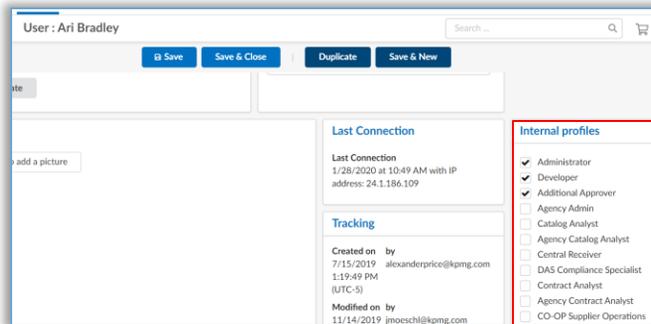
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To assign profiles and update organizations for the new user account, select the **Pencil** (✎) icon next to their account.



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Select the user’s profiles in the Internal Profiles section and then click **Save**.



- **Agency Admins** are able to view and edit all Sourcing, Contracts, Catalogs and Procurement across their agency. The Agency Admins approve one-time address requests and update requisition approval workflow performers for their agency.

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- **Catalog Analyst** have the ability to view, create, and manage hosted catalogs, as well as complete performance evaluations (only for DAS Office of Procurement Services).
- **Central Receivers** are able to receive and create returns across their agency as well as manage exceptions.
- **Contract Analyst** are able to view, create, and manage contract shells, as well as create and manage exceptions, improvement plans, and performance evaluations (only for DAS Office of Procurement Services).
- **Final Agency Approver** are able to review purchase requisitions for compliance with agency, budgetary, or State policies, and approve or reject purchase requisitions.
- **Fiscal Approver** has the ability to review purchase requisitions for compliance with agency, budgetary, or State policies, update budget allocation information as necessary, and approve or reject purchase requisitions.
- **Procurement Agency Approver** profile allows a user to review and approve requisitions and update requisition information.
- **Procurement Manager** has the ability to create and manage supplier exceptions, supplier improvement plans, and contract shells (only for DAS Office of Procurement Services).
- **Quick Quote Procurement User** is an additional role that allows users to generate and award quick quotes.
- **Requester Supervisor** profile allows users to review purchase requisitions for compliance with agency, budgetary, or State policies, and approve or reject purchase requisitions.
- **Requester** is a base profile meaning all users will have this and may have other profiles in addition. The only exception is if a user has a View Only profile; then this profile is not needed. This profile also allows users to submit Pcard requests, create/manage requisitions, receive, create returns, and create exceptions.
- **Requisite Program Approver** allows users to review purchase requisitions for items which could be provided by their program, and grants or denies a waiver request to procure from a different Supplier.
- **Requisitioner** allows users to update requisitions, receive, create returns, manage orders, create quick quotes.
- **SME Reviewer** allows users to review purchase requisitions for compliance with State policies for their spend category, and approve or reject purchase requisitions (only for DAS Office of Procurement Services).
- **Additional Approver** allows users to be pulled into the purchase requisition workflow using the **Forward** button. Users without this role cannot have requisitions forwarded to them by the current approver.

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The HCM integration will automatically assign the user’s State Agencies, Agency, Division, and Site level to the user’s profile. If additional assignments are needed, click on the **Org Perimeter** tab, select the appropriate agency organizations for that user and click **Save and Close** to return to the Browse Users page and activate the user’s profile.

- ▲ The **checkbox** () will allow selection of current value.
- ▲ The **hand icon** () allows selection of the current value and all values on the level beneath the current value.
- ▲ If a user is transferring between agencies, their organizations will be cleared for the old agency and the new organizations will need to be assigned. If a user is moving into a new role within the same agency, their organizations will remain the same. The old organizations will need to be de-selected and the new organizations will need to be assigned.

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User : JAMES BONNETTE

-  LIB-Library Board
-  **LOT-Lottery Commission**
 - LOT100000 - Business Development
 - LOT150000 - Charitable Gaming
 - LOT200000 - Communications
 -  LOT250000 - Executive
 -  LOT260000 - Govt and Comm Relations
 -  LOT270000 - Video Lottery Operations
 -  LOT300000 - Finance
 -  **LOT350000 - General Services**
 - LOT351100 General Services Management LSCH
 - LOT351200 Licensing/Bonding LSCH**
 - LOT351300 Lottery Call Center LOTWHSE**
 - LOT351300 Lottery Call Center LSCH
 - LOT351400 Office Services LSCH
 - LOT351500 Vehicles LSCH
 - LOT351600 Warehouse LOTWHSE

On the Browse Users page, click on the **Status** drop-down menu for the user you would like to enable and select **Active**.

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| Contact | User | Email | Profile | Status * | Type |
|--|--|------------------------|-----------|----------|------------------|
| <input type="checkbox"/> 1029102392104 |    Meyers John | jmeyers@mailinator.com | Requester | Active ▾ | Internal contact |

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Click **OK** to confirm the change in user status.

