Please note that the process for creating user accounts for Contractors can be completed by using the following ETL Templates: oh_users, oh_usr_hierachy, and std_user_perim_orga. Please refer to the Completing the ETL Process Job Aid for more information.

Individual Contractors can also be created by following the steps in this job aid.

An automatic integration is in place that sends new user information for OAKS into Ohio Buys. On the occasion that contractor information needs to be added or organizational hierarchy information needs to be edited, the steps within this job aid should be followed.

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.

Click Create new user.

In the Login tab, enter the user’s OAKS ID in the Login field and then click the SSO checkbox.

In the Identity tab, enter the user’s First Name, Last Name, Email, and Internal Identifier (i.e., the user’s OAKS ID).

In the Phone tab, enter the user’s Primary Phone.

You must enter the phone number in the following format: 111/111-1111
### Step-by-Step Instructions for Creating State User Accounts

In the Internal Profiles window, select the user’s role(s). Descriptions for some of the most common roles are listed below:

<table>
<thead>
<tr>
<th>Role</th>
<th>Functions</th>
</tr>
</thead>
</table>
| Requester                | • This is a default profile that all users should have  
• Submits Pcard purchases  
• Creates and maintains requisitions (Catalog and Freeform)  
• Creates receipts and returns for purchases they have created  
• Create exceptions                                                             |
| Requisitioner            | Requestor plus:  
• Able to update all sections of a requisition within their scope  
• Creates receipts and returns across their scope  
• Manages purchase orders (change orders)  
• Can create and award quick quotes                                               |
| Requisitioner (On Behalf Of) | Requisitioner plus:  
• Creates and maintains requisitions, but can do so on behalf of others                                |
| Emergency Requisitioner  | • Can be forwarded PR's for an additional approval  
• Additive role                                                                  |
| Quick Quote Procurement User | • Creates and awards quick quotes  
• Additive role                                                                  |
| Central Receiver         | • Creates receipts and returns across their agency  
• Creates exceptions                                                             |
| Procurement Agency Approver | • Reviews and approves requisitions  
• Able to update all sections of a requisition as an approver                     |
| Fiscal Agency Approver   | • Reviews and approves requisitions  
• Updates budget allocation information for requisitions as an approver            |
| Final Agency Approver    | • Reviews and approves requisitions                                                                                      |
| Additional Approver      | • Can be forwarded PR's for an additional approval  
• Additive role                                                                  |
| Agency Admin             | • Approves one-time address requests  
• Able to view and edit all Sourcing, Contracts, Catalogs and Procurement across their agency  
• Updates requisition approval workflow performers                                 |
| Agency Contract Analyst  | • Manages Contracts  
• Approves hosted catalog updates  
• Creates and manages performance evaluations, exceptions, and improvement plans |
| Agency Catalog Analyst   | • Manages and updates hosted catalogs                                                                                   |
| Agency Procurement Manager | • Oversees agency procurement  
• Manages and updates performance evaluations, exceptions, and improvement plans |
**Step-by-Step Instructions for Creating State User Accounts**

7. The **Exception Commodity List** field allows the user to purchase against restricted commodities. If the user is authorized to make restricted purchases, select the appropriate commodities here.

8. Click **Save**.


10. In the Organizational Hierarchy section, use the **Plus (➕)** icons and **Checkbox (☐)** icons to search for and select the site for the user. You should always use the **Checkbox (☐)** icons to select **OHIO** and **State Agencies** and then you should use the **Checkbox (☐)** icon to select the user's agency, division(s) and site(s). Please refer to the screenshot below as an example in which the user is part of the Dept. of Rehab & Corrections’ DRC1051000 Corrections Training Academy.

11. In the Geographical Hierarchy section:
   a) Click the **Plus (➕)** icon next to **OHIO**.
Step-by-Step Instructions for Creating State User Accounts

b) Scroll down on the page until you find the location that is listed in bold, once you find this value, click the **Plus (➕)** icon and **Checkbox (☐)** icon next to the location. Lastly, click the **Checkbox (☐)** icon next to the bolded five-digit number that is displayed. Please refer to the screenshot below as example, in which **Franklin** and **43146** appeared as bolded values. The bolded values you see in the Geographical Hierarchy are dependent on the values that are selected in the Organizational Hierarchy.

![Screenshot of Geographical Hierarchy]

12 Click **Save**.

13 Navigate to the **User Preferences** tab.

14 In the **My Preferences** window, enter and select a time zone of **Eastern Time (US and Canada)** in the **Time Zone** field.
Step-by-Step Instructions for Creating State User Accounts

15 In the Default Settings window, click the Drop-Down (•) icon on the Main Organization field, and select See All. The main organization will default on various documents such as the purchase requisition.

16 Click the Checkbox (✓) icon next to the value that has a Level of Site and then click the Close (x) icon.

17 Click Save.

18 Click Exit.

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).