Clicking on the **State of Ohio’s eProcurement Logo** at any time will take you to the homepage.

Using the **Navigational Icons** will take you back a page (←), let you view your history (🔍), or save the current page as a favorite (★).

The **Main Menu Navigation Bar** includes options available and applicable to you. Click on a main menu option (e.g., General Info., Sourcing, Contracts, etc.) to display its associated drop-down menu.

The **My Pending Validations** box displays tasks awaiting your review and approval. Clicking the hyperlinks will route you to the associated page to complete the necessary task.
The **My Profile** link displays your account profile and enables you to update your personal information (e.g., name, e-mail address, phone/fax number, default shipping address, Pcards associated with your account).

⚠️ For security purposes, your Pcard information will not automatically populate in Ohio eProcurement and must be manually entered:

- Double-check you have correctly entered your 16 digit Pcard number and 3 digit (Visa) security code since this information is not validated until a Pcard transaction is submitted (no dashes or spaces between numbers)
- Your Pcard number will be masked and you will be unable to edit it once you have added it to your profile
- If you need to make changes to an existing Pcard, click the Trash Can icon to remove your current Pcard and add a new Pcard with the correct details
- Your Pcard details remain invisible to other users

The **My open workflow tasks** link allows you to view and complete open workflow tasks assigned to you (e.g., Pcard Purchase Approvals).

The **My Scheduled Tasks** link allows you to view and complete open scheduled tasks; however, this option will not be used for the initial release of Ohio eProcurement.

The **My addresses** link displays your address(es) and enables you to update or add a new address.

The **Globe or Language Drop-Down Menu** allows you to choose and set your language preference.

The **Logout** link logs you out of the State of Ohio’s eProcurement solution.
Overview of a Typical Individual Page

The Page Name is the name of the page you are on and it is displayed in the top left corner of the page.

Requisition: REQ00000000271 - PR WW GRAINGER INC (Draft)

The wording of Action Buttons will vary by user role and the task being completed and are sometimes unavailable to certain users on specific pages. Use these buttons to take action on a particular task:

- **Green Buttons**: Submitting an action.
- **Red Buttons**: Canceling or rejecting an action.
- **Blue Buttons**: Saving, closing, or copying an action.

The Functional Tabs are located on the left side of a page. Every major task is organized by functional tabs. Clicking on these enable you to see additional information related to a specific task (e.g. Purchase Requisition or P-Card).

Alerts, if applicable, will not only vary by type, but the specific wording of each alert will vary by page and task. Alerts typically notify you of missing information, expiring documents, or new data required for a particular task. There are two types of alerts:

- **Red Blocking Alerts**: Prevent you from completing a particular task (e.g., submitting a vendor enrollment package) until action is taken to resolve the alert.
- **Yellow Caution Alerts**: Serve as a warning and are usually a request for additional information or documentation.

Required Fields are denoted by a red border on the left side of the field and require you to input applicable information before moving forward.

The Information Icon (ℹ️) displays a tool tip which can provide essential as well as relevant or helpful information regarding the specific field.
The **Universal Search** option appears in the upper right-hand corner of every page and enables you to enter keywords to initiate a search across all modules in Ohio eProcurement.

The **Browse Search** option appears when you click on **Browse** within a drop-down menu from Main Menu Navigation Bar (e.g. Browse Supplier, Browse Items). Using this option will only search that specific tab (e.g., searching in Browse Suppliers will only provide results from the supplier tab).

The **Advanced Search** option appears when you click **Browse** within a drop-down menu from the Main Menu Navigation Bar (e.g., Browse Supplier) and then click **Advanced Search**. Using this option enables you to further narrow your search results. The available fields will vary based on the selected tab.

Whether users use the Browse Search or Advanced Search option:

- Users can customize the way they view their search results on the search results page by right-clicking on a specific column header dragging/dropping it.
- From the results page, users are also given the option to export their search results to an Excel spreadsheet.
- Clicking the **Reset** button clears your search terms and returns you to your original search page (e.g., Catalog or Browse Items).

For fields that have an ellipse (… ) and drop-down menu, you must click on the result you want to search for BEFORE clicking **Search**. If you type in a word (e.g., Allstate) and it appears in the drop-down and you click **Search** before selecting it from the drop-down menu then your search will not search your keyword.

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If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via e-mail (ohiosharedservices@ohio.gov) or phone (877-644-6771).