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.

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.

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

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.
Managing State User Accounts

Step-by-Step Instructions for Managing State User Accounts

- **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.
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.

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

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).