

SIA Business Process

Ohio Buys Purchase Requisition Process

The frequency of process activities listed is **CONTINUOUS**

Preconditions

- Access to the [Ohio Buys](#) system
- Access to [Decision Lens](#)
- Analyst informed of assigned request
- Analyst-specific spreadsheet used to log procurement requests (optional)

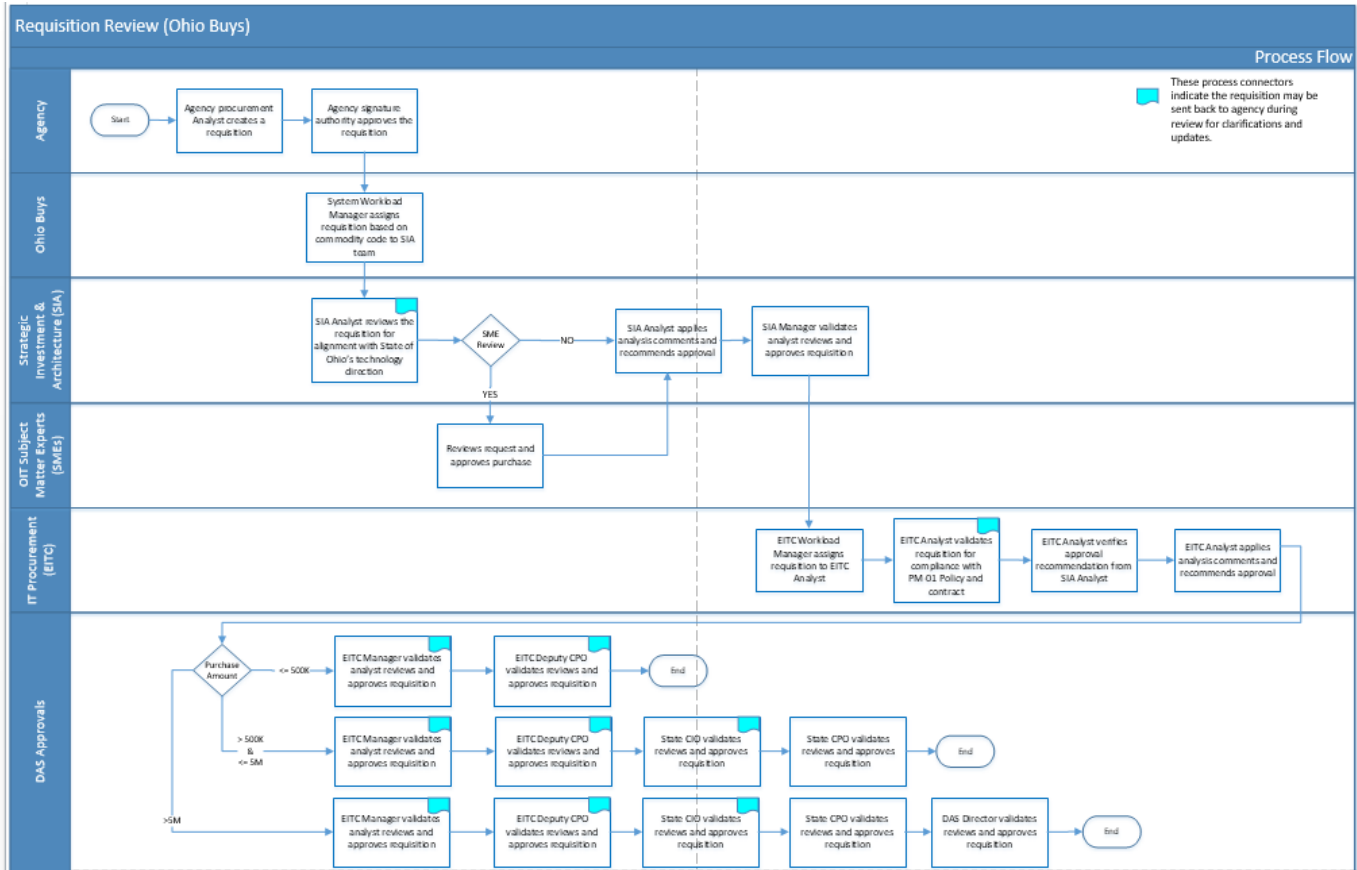
Ohio Buys System

- Ohio Buys training and job aids are defined based upon user roles and job functions
- All training materials and job aids can be found in the [OhioBuys Agency Training Catalog](#)
- Job aids specific to SIA functions:
 - [General Navigation Job Aid](#)
 - [IT SIM Assign IT SMEs](#)
 - [IT SIM Group + IT SME Approval](#)

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Requisition Review Process Workflow



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Process Activity — Processing a SIA assigned purchase requisition

Step 1:

- I. SIA analyst is notified of assigned purchase requisition request via email
- II. Log into the Ohio Buys system
- III. Populate the assigned purchase requisition request by either:
 - a) Utilizing the URL direction link in the email notification
 - b) Reviewing the 'My pending validation' section in Ohio Buys
 - c) Searching on the request number

Step 2:

- I. Review the *Purchase Requisition* tab, the SIA analyst should perform the following:
 - a) Review the requisition label, request description, and dollar amount.
- II. Review of the *Attachments* tab
 - a) Review the attachments for type of procurement requested (i.e., Desktop, Licensing, Database, Microsoft, etc.).
 - b) If no attachments are available, review the "Sourcing" option within the Items section at the bottom. If the Sourcing link is active, click on this link to populate the Sourcing project screen.
 - c) Choose the Analyze and Award tab from the left side car on the Sourcing project screen to review vendor proposals.
 - d) The vendor proposal which is awarded will show a green trophy under the Decision heading.
 - e) Choose this vendors proposal to review for the type of procurement requested (i.e., Desktop, Licensing, Database, Microsoft, etc.).
 - f) If deemed necessary, save the relevant document(s) for future reference or for requesting SME(s) approval outside of the standard workflow process.

Step 3:

- I. If the purchase requisition is for a strategic project, validate the Agency Enterprise Portfolio by reviewing Decision Lens.

Step 4: Review of procurement request

- I. If the SIA analyst determines that the purchase requisition requires a "SIA Only" review; the analyst will:
 - a) Navigate to the Workflow tab of the purchase requisition
 - b) Scroll down and toward the bottom right to the 'Performers of the following activities' section
 - c) Choose the drop-down arrow for IT SME and assign it to yourself
 - d) At the top of the Workflow page, click on the green 'IT SIM Assign' button

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- e) Document the appropriate review comments on the Workflow tab within the Add Comments section utilizing the following template and save:

SIA Reviewer:

This request is for (Agency) to procure (what?), which supports (which service or solution). This purchase request has been reviewed by SIA analyst and validated to be in alignment with the enterprise strategic direction.

The SIA team determined no additional SME reviewers are required for the request.

- f) Choose the 'Forward' button at the top of the Workflow page and assign it to SIA team lead for peer view.
- g) Click the 'Submit' button which finalizes the process.
NOTE: Once the request has been peer reviewed, the workflow process will be invoked, and the request will automatically be routed to the next appropriate approver.

- II. If the SIA analyst determines that the procurement request requires an "SME" review; the analyst will:

- a) Navigate to the Workflow tab of the purchase requisition
- b) Scroll down and toward the bottom right to the 'Performers of the following activities' section
- c) Choose the drop-down arrow for IT SME and assign to the appropriate SME(s) referencing the Enterprise Reviewers List document
NOTE: More than one review may need to be performed based upon the requested procurements.
NOTE: Once a requisition is sent for an SME review, additional SMEs cannot be added and engagement via email must be performed.
- d) The SIA analyst may update their analyst-specific spreadsheet to note the request was sent out for SME review (optional).
- e) Ohio Buys will notify the SIA analyst via email once the SME has provided a response / determination and the record will return to the 'My pending validation' section.
- f) Open the IT Review tab and review the SME comments
- g) Document the appropriate review comments on the Workflow tab within the Add Comments section utilizing the following template and save:

Enterprise Review:

This request is for (Agency) to procure (what?), which supports (which service or solution). This purchase request has been reviewed by SIA analyst and validated to be in alignment with the enterprise strategic direction.

(SME Reviewer name and Service Area) was requested for a review, and he/she recommended approval with the following comments, "....."

OR

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(SME Reviewer name and Service Area) was requested for a review, and he/she approved without commenting.

- h) Choose the 'Forward' button at the top of the Workflow page and assign it to SIA team lead for peer view.
- i) This finalizes the process.
NOTE: Do NOT click the approve button as this will move the request forward without a peer review.
- j) If the SME review cannot be conducted via the standard purchase requisition workflow, engage the appropriate SME(s) via email.
- k) Ensure the email includes any pertinent information such as purchase description, attachments, dollar amounts, etc.
- l) Once feedback is received for a review that was not conducted via the standard purchase requisition workflow, document the email comments and approval utilizing the Enterprise Review template above and continue the process (Step g - i).
NOTE: Once the request has been peer reviewed, the workflow process will be invoked, and the request will automatically be routed to the next appropriate approver.

Process Activity—Modification (Copy Of) previously approved purchase requisition

Step 1:

- I. Review the modification request details.
- II. Determine what the modification amount requested is for, i.e., change in scope, increase in hours, etc.
- III. The SIA analyst will evaluate / determine if a follow-up review is needed for the modification.
 - a) When no additional review of the modification is needed, the SIA analyst will process the modification request as outlined in **Step 4:I.a**, utilizing the comments within the original purchase requisition.
 - b) When an additional review of the modification is needed, the SIA analyst will process the modification request as outlined in **Step 4:II.a-I**.

Optional Considerations:

- I. Email customization
 - a) Communicate with service owners
 - ✓ Gather / share additional information you may have from agency
 - ✓ Ask questions regarding the status of their review
- II. On-going concern from SME approver
 - b) Update the Agency Follow-up Issue Log on SharePoint with details
 - ✓ <https://ohiodas.sharepoint.com/sites/DSAIM/Lists/Agency%20Followup%20Issue%20Log/AllItems.aspx>

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Version Revisions:

Date Version	Description	Author	Version
02/09/22	Document Creation	Delania Hopper	v1
05/16/22	DAS URL Updates	Delania Hopper	V2