



Title:	BobcatBUY Fundamentals User Guide	Date Modified: 10/25/2018
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Purpose: The purpose of this document is to assist employees tasked with procuring goods and/or services using BobcatBUY. Press the **CTRL** key on your keyboard and click the desired topic in the Table of Contents below, to be directed to that section in this document.

For Questions Contact: Finance Customer Care Center, 740-597-6446,
financecustomercare@ohio.edu

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INTRODUCTION

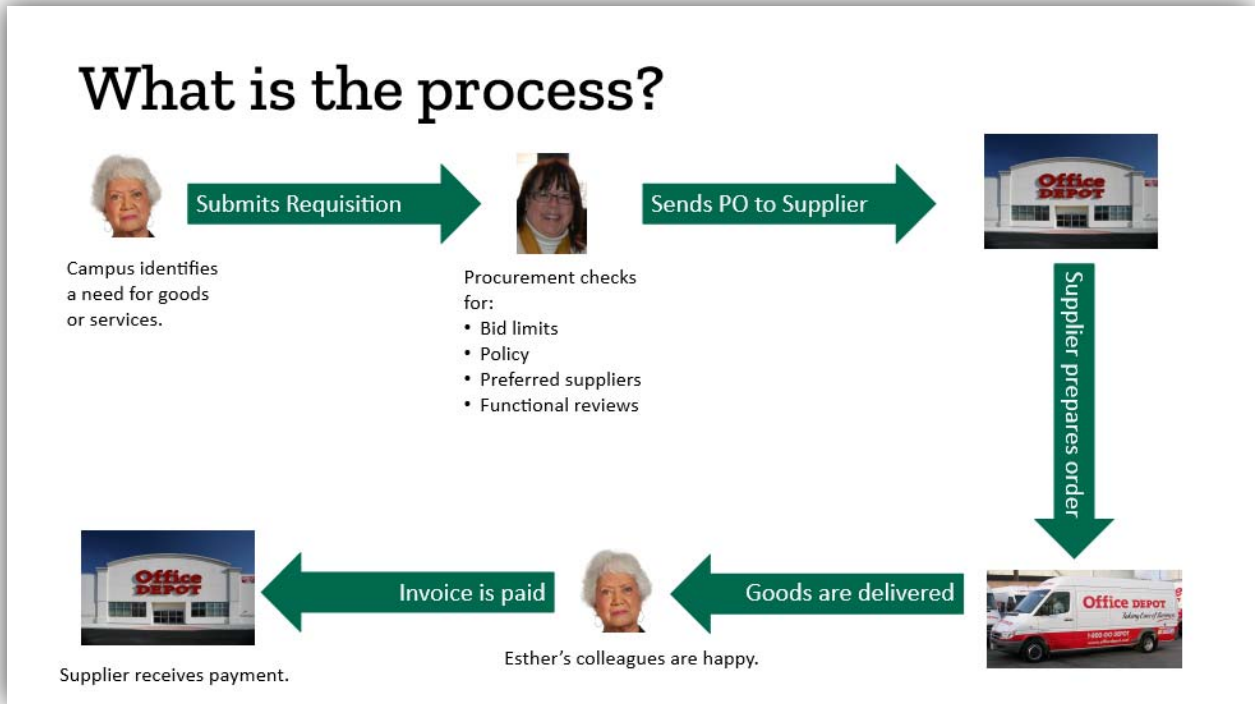
BobcatBUY is the application used by Ohio University to automate eProcurement and payments to maximize savings and increase productivity. Data from this system is used to negotiate discounts and decrease the number of PCard purchases. The University assigns roles to BobcatBUY users. As a result, BobcatBUY’s workflow automatically routes purchase requests to the appropriate staff for review and approval. This allows planning units and Finance to monitor funds being spent.

BobcatBUY User Roles

User Role	Definition
Shopper	Shopper is the default user role for all OHIO employees.
Requester	A Requester is assigned by the planning unit. A Requester approves and submits requisitions up to \$1,499.99.
Approver #1	Approver #1 is assigned by the planning unit. Approver #1 must approve and submit requisitions between \$1,500 and \$9,999.99.
Approver #2	Approver #2 is typically the planning unit’s Chief Financial and Administrative Officer (CFAO). Approver #2 must approve all requisitions over \$10,000.

Purchasing Process

BobcatBUY’s workflow will route a requisition to the appropriate OHIO staff person for any necessary functional reviews.



Log in to BobcatBUY

Mozilla Firefox is the recommended web browser for BobcatBUY. **NOTE:** Please allow pop-ups.

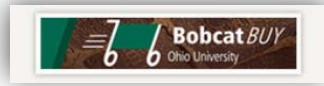
1. To access BobcatBUY, from the Finance website, click the **BobcatBUY** icon.



2. Login with your **OHIO ID** and **Password**.
3. Complete **DUO Multi-factor authentication**.

Option 2:

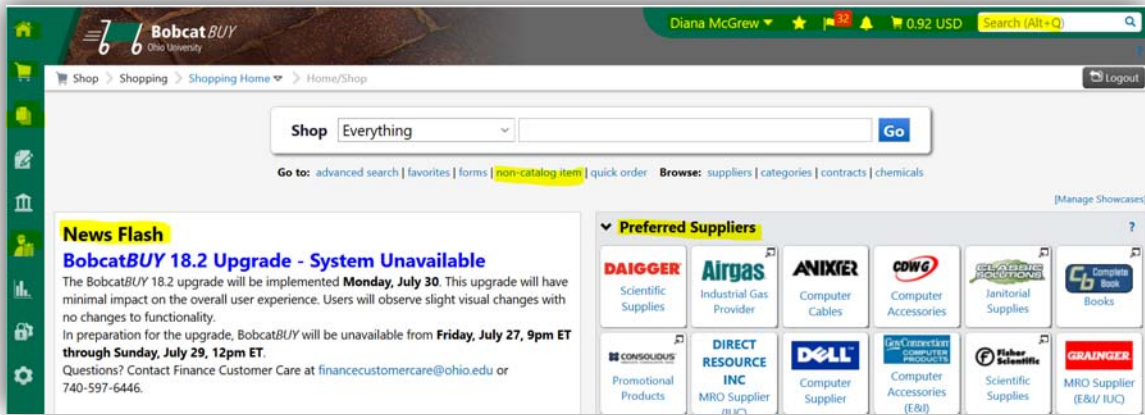
1. Alternatively, visit **OHIO’s home page**, click **Faculty/Staff**, and click the **BobcatBUY** button (on the left).



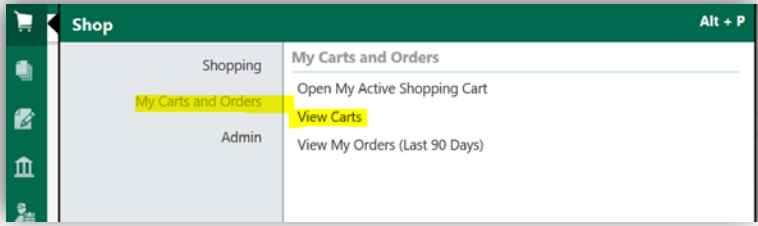
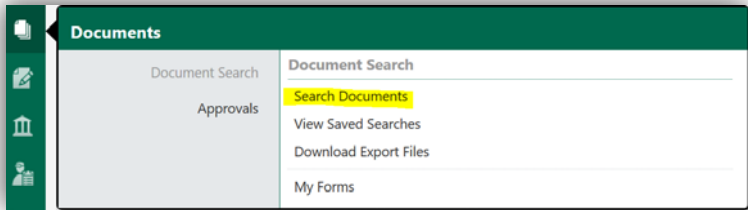
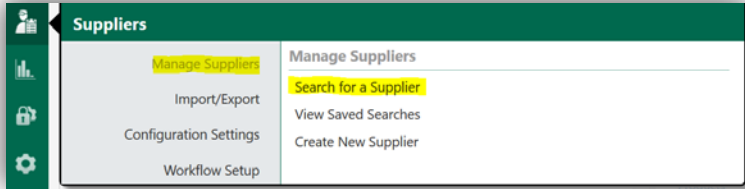
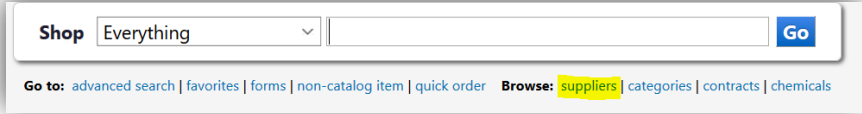
2. Login with your **OHIO ID** and **Password**.
3. Complete *DUO Multi-factor authentication*.

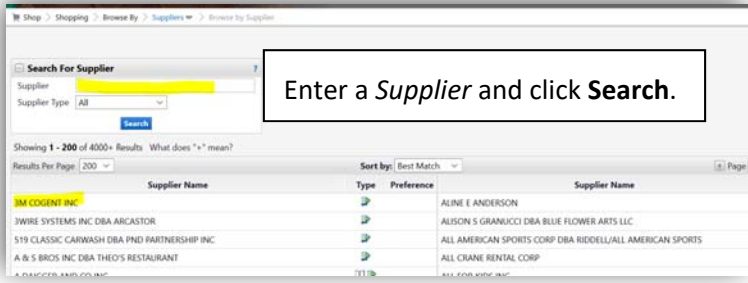

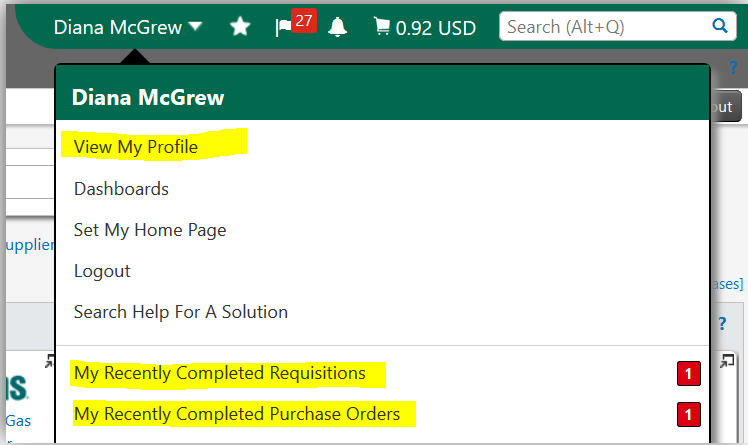
Navigation

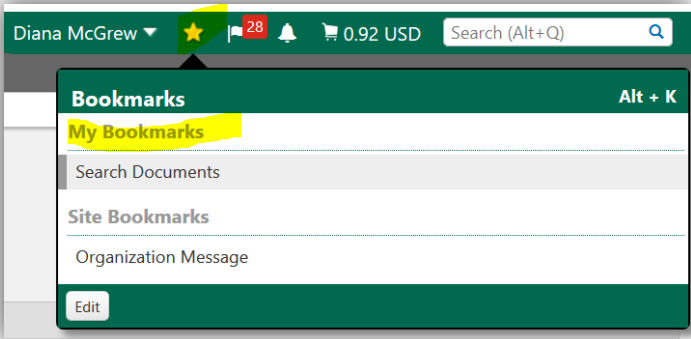
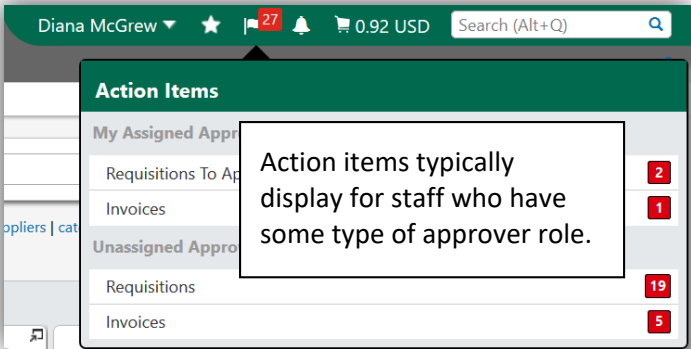
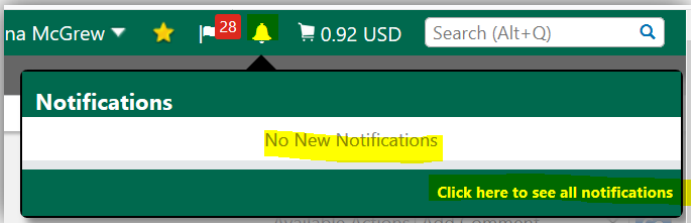
BobcatBUY’s main page provides important information and announcements under the News Flash section. You may navigate using the left vertical ribbon or the top right ribbon. Under the **Preferred Suppliers** section, you will find all of the supplier catalogs that are available. The supplier’s logo is shown along with subtext that describes the category of items the supplier offers. Also available on BobcatBUY’s main page is the link to **Non-catalog Item** order form.

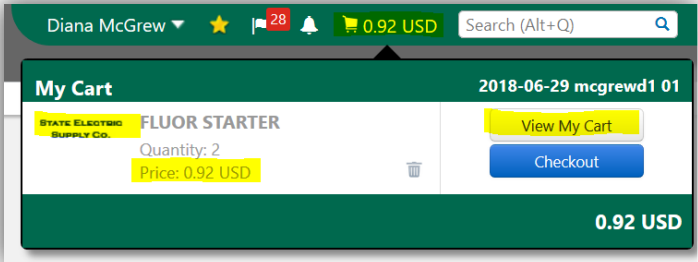
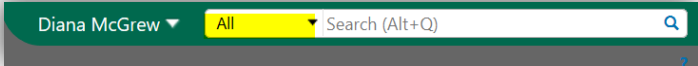


Icon/Button	Definition
News Flash	BobcatBUY’s main page provides important information, announcements, and links.
Left Vertical Ribbon	
Home	Use the Home icon to navigate back to BobcatBUY’s main page.
Shop	Use the Shop icon to find and manage your shopping carts. You may create a new cart or view existing carts.

Icon/Button	Definition
	 <p>The screenshot shows a 'Shop' menu with a dark green header. On the left is a vertical sidebar with icons. The main menu has three items: 'Shopping', 'My Carts and Orders' (highlighted in yellow), and 'Admin'. The 'My Carts and Orders' item is expanded to show a sub-menu with three options: 'Open My Active Shopping Cart', 'View Carts' (highlighted in yellow), and 'View My Orders (Last 90 Days)'. The text 'Alt + P' is visible in the top right corner of the menu.</p>
<p>Documents</p>	<p>All transactions within BobcatBUY are assigned a document number. The documents icon will allow you to search for documents. You may also see recent approvals as well as exported searches.</p>  <p>The screenshot shows a 'Documents' menu with a dark green header. On the left is a vertical sidebar with icons. The main menu has two items: 'Document Search' and 'Approvals'. The 'Document Search' item is expanded to show a sub-menu with four options: 'Search Documents' (highlighted in yellow), 'View Saved Searches', 'Download Export Files', and 'My Forms'.</p>
<p>Suppliers</p>	<p>Suppliers allow you to search for a supplier. This search will show you both active and inactive suppliers.</p>  <p>The screenshot shows a 'Suppliers' menu with a dark green header. On the left is a vertical sidebar with icons. The main menu has five items: 'Manage Suppliers' (highlighted in yellow), 'Import/Export', 'Configuration Settings', and 'Workflow Setup'. The 'Manage Suppliers' item is expanded to show a sub-menu with four options: 'Manage Suppliers', 'Search for a Supplier' (highlighted in yellow), 'View Saved Searches', and 'Create New Supplier'.</p> <p>You may also search for a supplier from the main page, but this search will <u>only</u> show <u>active</u> suppliers.</p>  <p>The screenshot shows a search bar with the text 'Shop' and a dropdown menu showing 'Everything'. To the right of the dropdown is a search input field and a blue 'Go' button. Below the search bar, there is a 'Go to:' section with links for 'advanced search', 'favorites', 'forms', 'non-catalog item', 'quick order', and a 'Browse:' section with links for 'suppliers' (highlighted in yellow), 'categories', 'contracts', and 'chemicals'.</p> <p>NOTE: If you do not enter a supplier name in the <i>Supplier</i> search field, the results will display an alphanumeric listing of all active suppliers.</p>

Icon/Button	Definition
	
<p>Shop Everything</p>	<p>WARNING: It is recommended that you do not use the Shop Everything field on BobcatBUY’s main page. This field only works with hosted catalogs. Currently, the majority of OHIO suppliers are punch-out catalogs. Each supplier maintains them; they are <u>not</u> hosted within BobcatBUY.</p> 
<p>Top Right Ribbon</p>	
<p>(Your) Name</p>	<p>Your name will display your recently completed requisitions. You can view your user profile or logout of BobcatBUY.</p> 
<p>Bookmarks (star)</p>	<p>The star icon will display your bookmarked favorites. You may bookmark certain pages within BobcatBUY and access your favorites here.</p>

Icon/Button	Definition
	
<p>Action Items (flag)</p>	<p>The flag icon will show you any pending action items; they may be assigned or unassigned. If your role is solely to shop, you will not see anything here.</p> 
<p>Notifications (bell)</p>	<p>The bell will display any notifications of current transactions. You may turn off notifications; however, it is highly recommended that you keep them enabled.</p> 
<p>Cart</p>	<p>The cart icon will display the contents of your <i>active</i> cart. You may view your cart's detail before selecting View My Cart or Checkout.</p>

Icon/Button	Definition
	
<p>Quick Search</p>	<p>Similar to documents search, this search field allows you to search for a specific document by entering the document number. It is recommended that you leave All selected, so it will search all documents in BobcatBUY.</p> 

SETUP USER PROFILE

In BobcatBUY, you may setup your default user settings within your user profile to save time when you are shopping. Specifying defaults for the following user settings is a real time-saver:

- Custom Field and Accounting Code Defaults – your frequently used account numbers
- Default Addresses – your campus address where your purchases will be delivered
- Cart Assignees – your requester/approver depending on your user role

1. In the top right ribbon, click to select your **Name** and click **View My Profile**.
2. Verify your personal information (name, phone number, email, and organization) is correct. **NOTE:** This information is uploaded from OHIO’s Human Resources system. If this information is incorrect, contact the Employee Service Center (ESC), 740-593-1636, or email uhr@ohio.edu.
3. Click to select **Default User Settings** (on the left).

Diana McGrew

User Name mcgrewd1

- User Profile and Preferences ▾
- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- Update Security Settings >
- Default User Settings ▾
- Custom Field and Accounting Code Defaults
- Default Addresses
- Cart Assignees
- Financial Approvers
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >

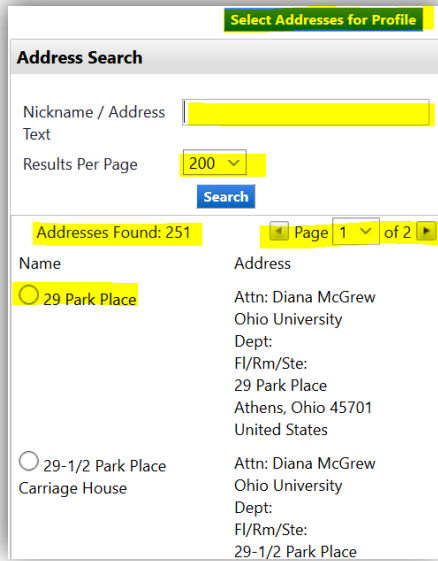
User's Name, Phone Number, Email, etc.

First Name	<input type="text" value="Diana"/>
Last Name	<input type="text" value="McGrew"/>
Phone Number	<input type="text" value="+1 740-593-1957"/>
Mobile Phone Number	<input type="text" value=""/>
	<small>International phone numbers must begin with +</small>
E-mail Address *	<input type="text" value="mcgrewd1@ohio.edu"/>
Department (HR Organization) *	<input type="text" value="830035 PROCUREMENT (830035)"/>
Position	<input type="text" value=""/>
User Name *	<input type="text" value="mcgrewd1"/>
Authentication Method	<input type="text" value="SAML"/>

Default Shipping Address

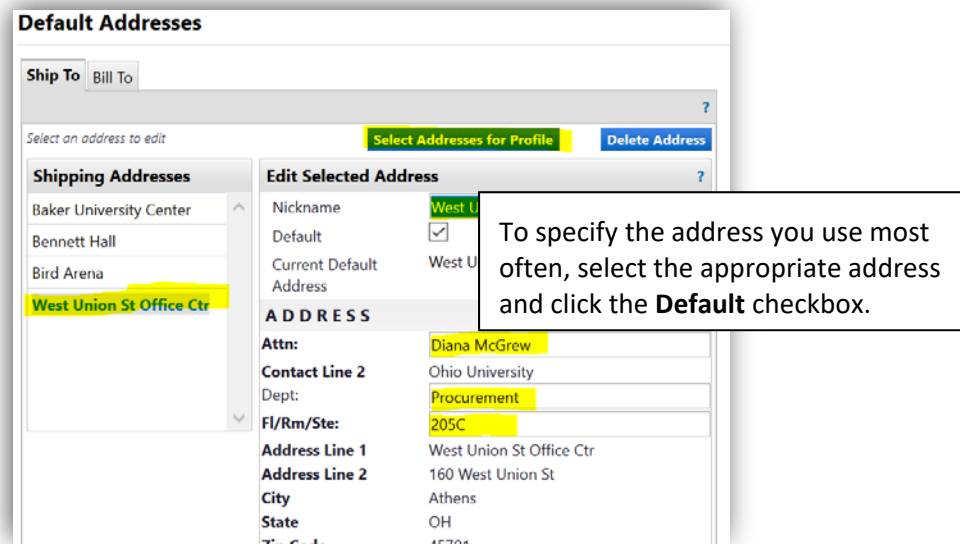
You may setup your default campus addresses to specify where you want your purchases to be delivered. You may setup several addresses to choose from or one address as your default. To add an address, you must select from the master list of OHIO addresses. You may customize the nicknames for your selected addresses. You may also add a name to the Attention line; fill in the department, and the floor/room/suite line. Alternatively, you may leave them blank and fill them in when you are shopping.

1. In the top right ribbon, click to select your **Name** and click **View My Profile**.
2. Click to select **Default User Settings** (on the left).
3. Click **Default Addresses**.
4. Click the **Select Addresses for Profile** button.
5. In the *Nickname/Address* field, enter your **building's name** and click **Search**. **NOTE:** In BobcatBUY, there are currently 250 approved campus addresses to choose from. Addresses are only available in BobcatBUY, if they have been approved by University Planning.



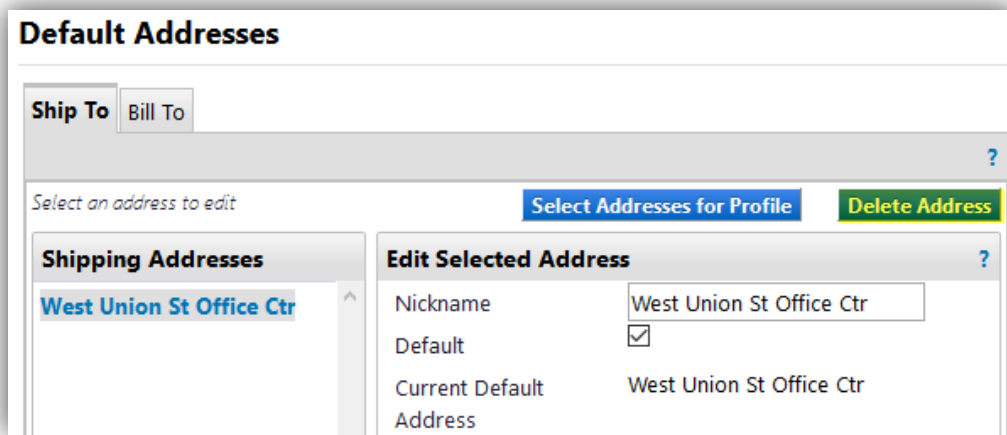
6. Click the **radio button** next to your building’s name.
7. Enter the following:

Field Name	Enter...
Nickname	Enter a nickname (me, a co-worker’s name, faculty, etc.)
Default	Click the checkbox if you want this to be your default shipping address.
Attn:	Enter your full name.
Dept.	Enter your department.
Fl/Rm/Ste (Floor/Room/Suite)	Enter your room number.
Click Save .	



- When you have finished creating your list of addresses, they will display on the left. Your default address will display in bold.

NOTE: If you ever need to remove an address from your list of shipping addresses, you may return to *Default Addresses* and click the **building** that you would like to remove, and click the **Delete Address** button.



Default Cart Assignee

In BobcatBUY, if you have the shopper user role, you may create a cart and shop for items; however, you must assign your cart to your planning unit’s authorized requester. To save time, you may specify a default cart assignee so that when you assign your cart, it will automatically route to your requester via BobcatBUY’s workflow.

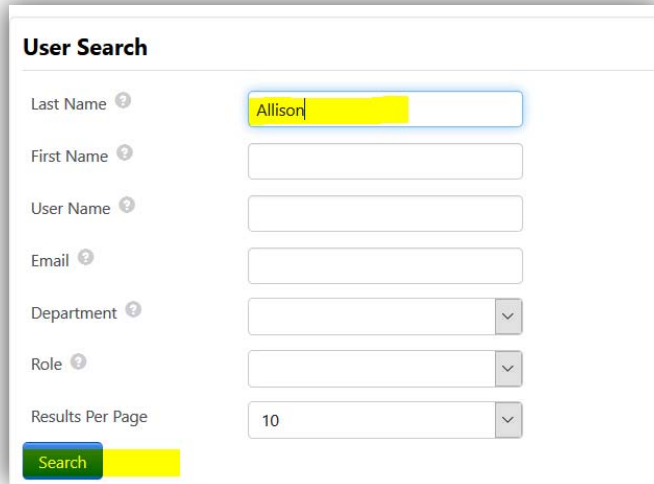
- In the top right ribbon, click to select your **Name** and click **View My Profile**.
- Click to select **Cart Assignees** (on the left).

- Click the **Add Assignee** button.



ATTN: IF YOU DO NOT KNOW WHO YOUR REQUESTER/APPROVER IS, ASK YOUR SUPERVISOR, YOUR DEPARTMENT'S FINANCIAL MANAGER, OR YOUR PLANNING UNIT'S CFAO. THIS IS ALSO THE PERSON WHO CAN PROVIDE YOU WITH THE APPROPRIATE ACCOUNT NUMBER(S) TO CHARGE YOUR PURCHASES.

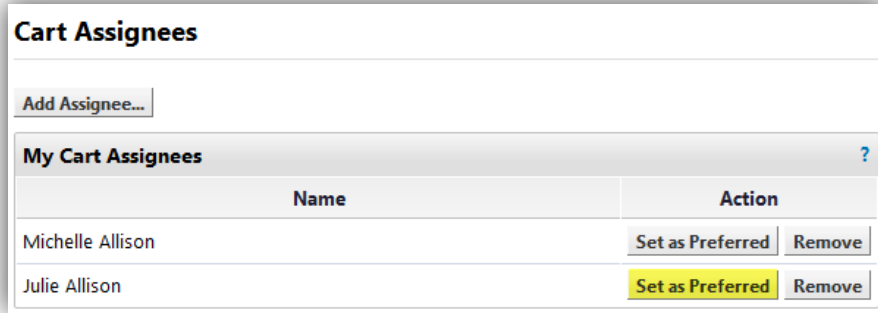
- In the *Last Name* field, enter the person's **last name** and click **Search**.



- From the list of names that display, next to the appropriate person, click **Select**.
- If you purchase items for multiple departments, you may search for additional assignees.

Name ▲	User Name ▲	Email ▲	Phone	Action
Allison, Julie	allison	allison@ohio.edu	+1 740-593-0342	[select]
Allison, Michelle	shockey	shockey@ohio.edu	+1 740-593-1870	[select]

- 7. When you have finished creating your list of cart assignees, you may select one as your default. To specify your default cart assignee, next to the appropriate person, click the **Set as Preferred** button.



NOTE: If you ever need to remove someone from your list of cart assignees, you may return to *Cart Assignees* and click the **Remove** button next to the appropriate person’s name.



Default Accounting Code Favorites

In BobcatBUY, every transaction requires an accounting string (cost center) to account for whose budget will pay for the purchase. If there is a specific account string that you use often, you may specify it as your default cost center. Alternatively, if you use several accounting strings, you may setup all of them without specifying a default. Then you may select the proper accounting string each time you make a purchase.

1. In the top right ribbon, click to select your **Name** and click **View My Profile**.
2. Click to select **Custom Field and Accounting Code Defaults** (on the left).
3. Click to select the **Code Favorites** tab.
4. Click the **Add** button.

The screenshot shows the 'Custom Field and Accounting Code Defaults' page. At the top, there are tabs for 'Header (int.)', 'Header (ext.)', 'Codes', 'Code Favorites', and 'Cart'. The 'Code Favorites' tab is selected. Below the tabs is a help icon and a paragraph explaining Code Favorites. An 'Add' button is visible. Below that is the 'Accounting Codes' section, which contains a table with one entry for 'procurement' and 'Edit' and 'Delete' buttons.

Account Type	Entity Source Org /PTA	Entity / Project	Source / Task	Organization / Task Org	Activity/Award	Function
General Ledger	10-100000-830035 GENERAL UNRESTRICTED PROCUREMENT	10 GENERAL	100000 UNRESTRICTED	830035 PROCUREMENT	0000 UNSPECIFIED	80 GENERAL ADMINISTRATION

In BobcatBUY, there are two types of accounting strings: General Ledger and Grants. They each have their own structure and required fields. In the system, both accounting structures share the same fields. As a result, you will see a “/” in the field titles to indicate what that field will populate (Entity, Source, Org/PTA).

ALWAYS CLICK SELECT FROM ALL VALUES WHEN ADDING YOUR ACCOUNT STRING.

Field Name	Enter...
Nickname	You may assign a meaningful nickname to your saved accounting string in order to easily recognize and retrieve it.
Default	Click the checkbox if you want this to be your default cost center.
Account Type	Click to select General Ledger or Grants .
Entity Source Org/PTA	Click Select from all values . Enter the value (including hyphens) or description and click Search . Next to the appropriate value, click Select .
Entity/Project	This field will auto-populate.
Source/Task	This field will auto-populate.
Organization/Task Org	This field will auto-populate.
Activity/Award	Click Select from all values . Enter the value or description and click Search . Next to the appropriate value, click Select .
Function	Click Select from all values . Enter the value or description and click Search . Next to the appropriate value, click Select .
Click Save .	

- When you have finished creating your list of accounting codes, you may select one as your default. To specify your default cost center, for the appropriate account, click the **Edit** button, click to select the **Default** checkbox, and click **Save**.

The screenshot shows the 'Accounting Codes' form. At the top, there is a 'Nickname' text box and a 'Default' checkbox. Below this is a table of fields for accounting codes:

Account Type	Entity Source Org /PTA	Entity / Project	Source / Task	Organization / Task Org	Activity/Award	Function
General Ledger	10-100000-830035	10	100000	830035	0000	80
Select from all values...	Select from all values...	Select from all values...	Select from all values...	Select from all values...	Select from all values...	Select from all values...

At the bottom of the form are 'Save' and 'Cancel' buttons.

NOTE: If you ever need to remove an account from your list of accounting codes, you may return to *Custom Field and Accounting Code Defaults*, click the **Code Favorites** tab, and click the **Delete** button for the appropriate accounting string.

Accounting Code for Payment Requests

In BobcatBUY, you must also setup accounting codes for Payment Requests. Payment Requests are stored a different module in BobcatBUY; however the process for adding them is the same.

1. In the top right ribbon, click to select your **Name** and click **View My Profile**.
2. Click to select **Custom Field and Accounting Code Defaults** (on the left).
3. Click to select the **Code Favorites** tab.
4. Scroll down. Under *Code Favorites for Check Requests & Invoices*, click the **Add** button.

ALWAYS CLICK SELECT FROM ALL VALUES WHEN ADDING YOUR ACCOUNT STRING.

Field Name	Enter...
Nickname	You may assign a meaningful nickname to your saved accounting string in order to easily recognize and retrieve it.
Default	Click the checkbox if you want this to be your default cost center.
Account Type	Click to select General Ledger or Grants .
Entity Source Org/PTA	Click Select from all values . Enter the value (including hyphens) or description and click Search . Next to the appropriate value, click Select .
Entity/Project	This field will auto-populate.
Source/Task	This field will auto-populate.
Organization/Task Org	This field will auto-populate.

Field Name	Enter...
Activity/Award	Click Select from all values . Enter the value or description and click Search . Next to the appropriate value, click Select .
Function	Click Select from all values . Enter the value or description and click Search . Next to the appropriate value, click Select .
Click Save .	

- When you have finished creating your list of accounting codes for check requests and invoices, you may select one as your default. To specify your default cost center, for the appropriate account, click the **Edit** button. Click to select the **Default** checkbox and click **Save**.

Accounting Codes

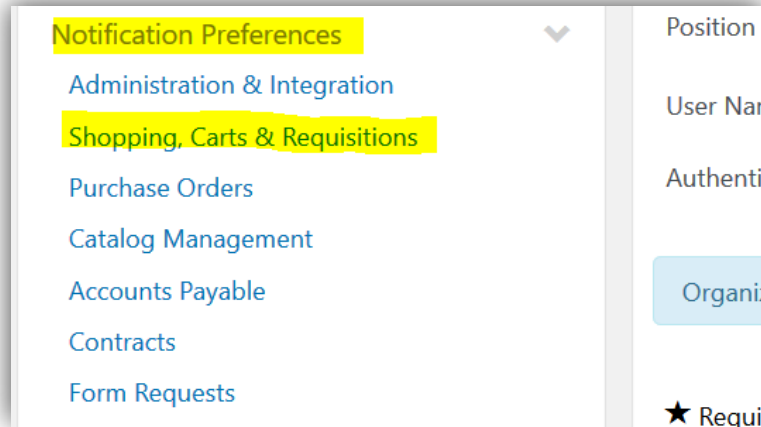
Nickname Default

Account Type	Entity Source Org /PTA	Entity / Project	Source / Task	Organization / Task Org	Activity/Award	Function
General Ledger	10-100000-830035	10	100000	830035	0000	80
<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>

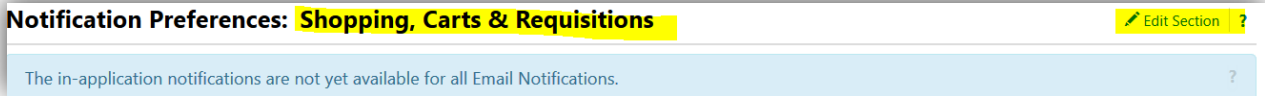
NOTE: If you ever need to remove an account from your list of accounting codes for check requests and invoices, you may return to *Custom Field and Accounting Code Defaults*, click the **Code Favorites** tab and scroll down. Under *Code Favorites for Check Requests & Invoices*, click the **Delete** button for the appropriate accounting string.

Notification Preferences

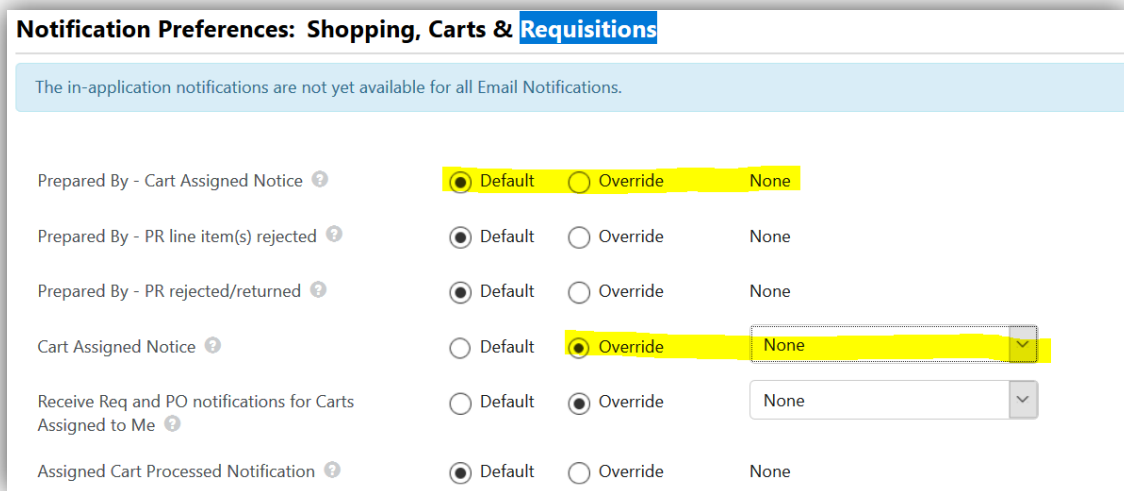
BobcatBUY sends notifications (within the system and via email) to users as transactions move through workflow. You have the ability to turn the notifications off in your user profile. **WARNING:** It is highly recommended that you keep your notifications enabled.



1. To change the notification settings, in the top right ribbon, click to select your **Name** and click **View My Profile**.
2. Click to select **Notification Preferences** (on the left).
3. When the list expands, click to select the area for which the notifications are being generated (**Shopping, Carts & Requisitions**).
4. Click **Edit Section**.



5. Click the radio button to change the setting. Use the drop down menu to override the default. The choices from the menu are: None, Email, Notification (in BobcatBUY), or Email and Notification.

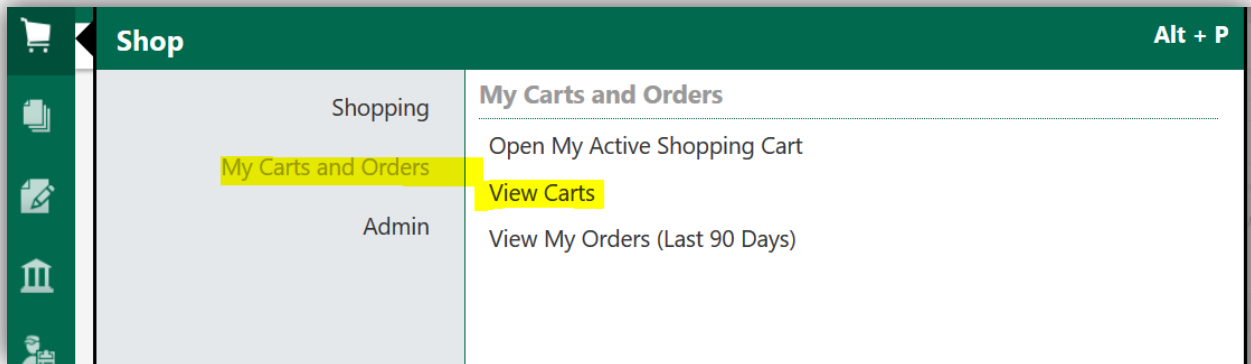


SHOP AND MANAGE CARTS

Create Cart

In BobcatBUY, it is recommended that you create a new cart for each shopping event. **WARNING:** You may only have one supplier per cart.

1. In the left vertical ribbon, click the Cart icon, trace to *My Carts and Orders*, and click **View Carts**.

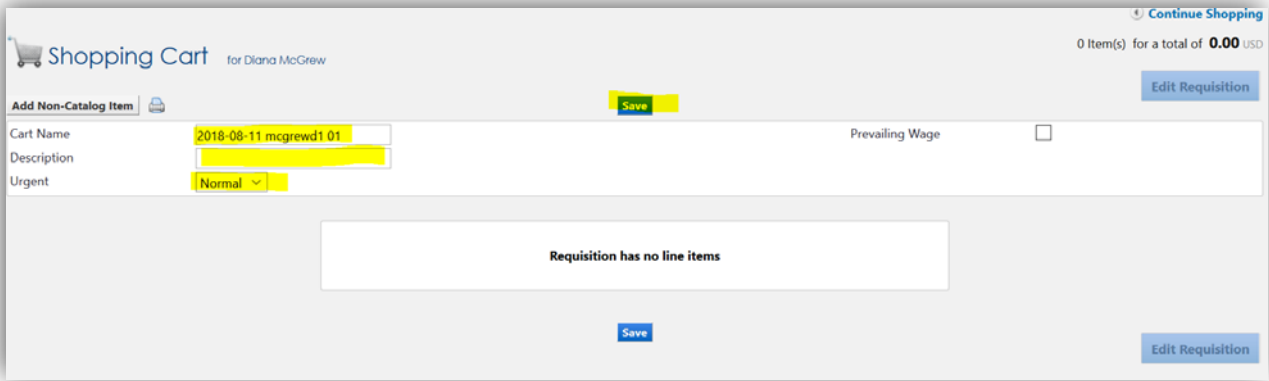


2. On the **Draft Carts** tab, click the **Create Cart** button.

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	105205729	2018-06-29 mcgrewd1 01		6/29/2018	0.92 USD	View
Normal	105205869	2018-06-29 mcgrewd1 02		6/29/2018	6.07 USD	View
Normal	105708860	2018-07-12 mcgrewd1 01		7/12/2018	0.00 USD	View

ATTN: IN BOBCATBUY, ONLY ONE SUPPLIER IS PERMITTED PER CART.

3. When creating a cart, change the *Cart Name* to something meaningful to describe your shopping purpose/contents. This will allow you to easily identify it, when reviewing your list of carts. The (optional) *Description* has a limit of 250 characters.
4. If a cart needs to be expedited for a valid reason, click the **down arrow** and select **Urgent**.
5. Click **Save**.



NOTE: When a cart becomes *active*, all items added from shopping will go into the active cart.

Cart Management Create Cart ?

Draft Carts Assigned Carts

Filter Draft Carts

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	105205729	2018-06-29 mcgrewd1 01		6/29/2018	0.92 USD	View
Normal	105205869	2018-06-29 mcgrewd1 02		6/29/2018	6.07 USD	View
Normal	105708860	2018-07-12 mcgrewd1 01		7/12/2018	0.00 USD	View
Normal	106969107 Active	2018-08-11 mcgrewd1 01	new cart	8/11/2018	0.00 USD	View

Example I: Shop a Punch-out Catalog

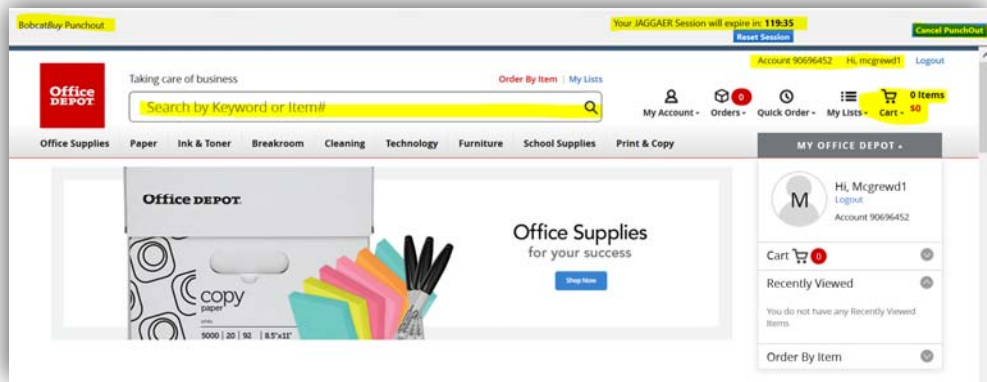
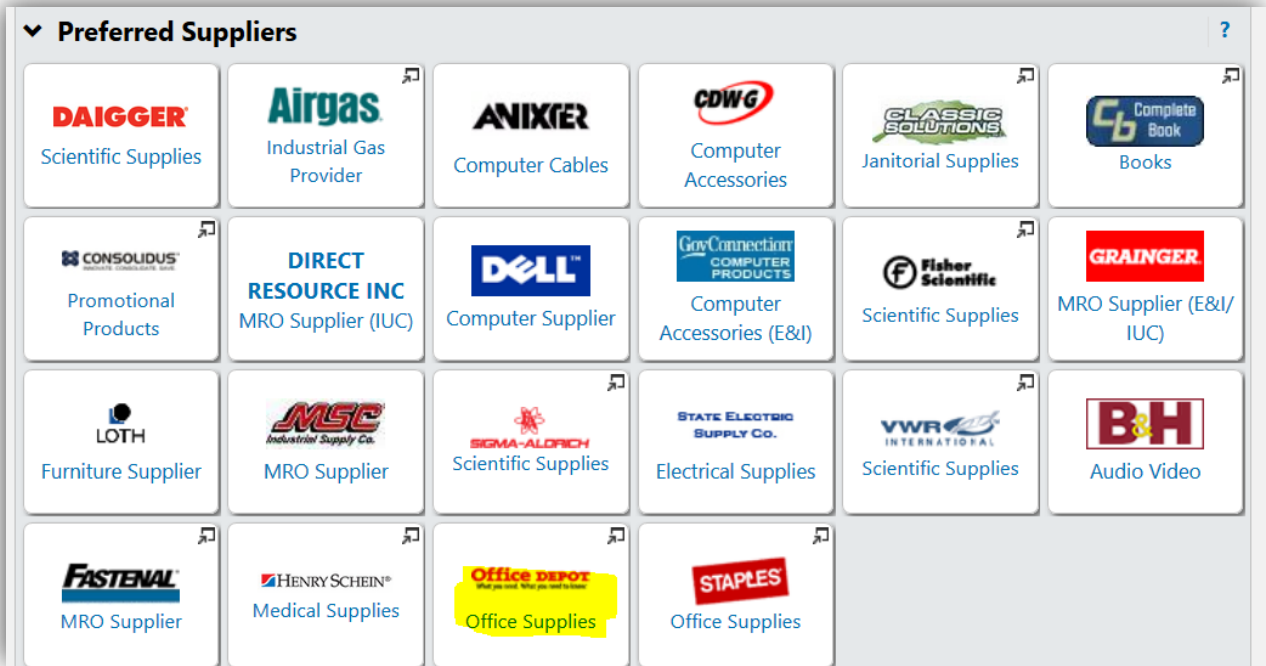
In BobcatBUY, a punch-out catalog leaves BobcatBUY and connects to the suppliers own catalog website. Each punch-out catalog’s landing page will look a little bit different; each supplier designs and maintains their own website.

Most pages will contain similar information. Each website will welcome you as part of Ohio University. You will always see the top ribbon, identifying your screen as a BobcatBUY punch-out. Each site will have fundamental on-line shopping functions: a key word search feature to find the item (s) you are looking to buy, a cart to show you the items you have selected, and your order history.

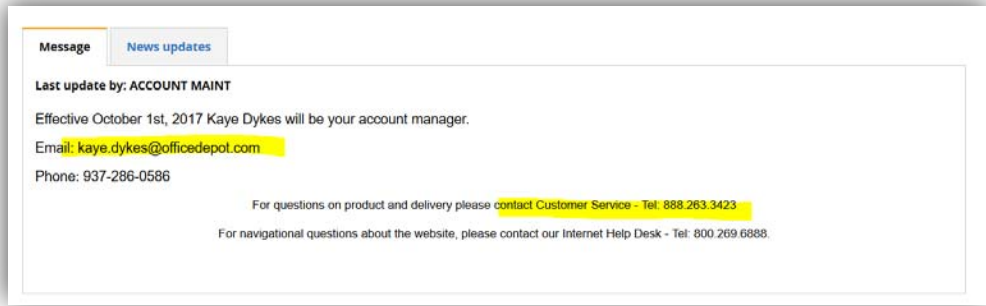
The top ribbon will also display the amount of time you have to complete your shopping. **NOTE:** Each punch-out catalog allows 120 minutes of shopping time before the session ends. If you require additional time, you may add time by clicking the **Reset Session** button. If you would like to end your shopping event, you may click **Cancel Punchout**.

WARNING: IF YOU HAVE ITEMS IN YOUR CART AND YOU CLICK CANCEL PUNCHOUT, THE ITEMS IN YOUR CART WILL NOT BE SAVED.

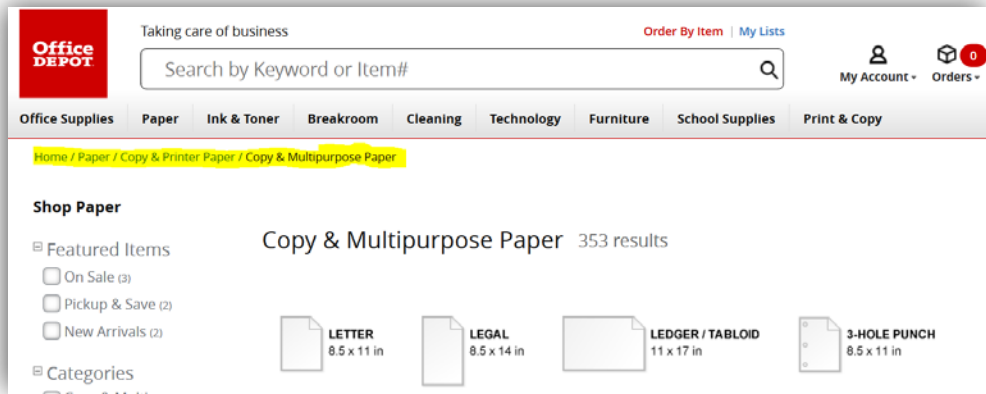
From BobcatBUY's main page, click to select a **Catalog** icon.



Some websites will identify OHIO's account representative and/or provide customer service contact information:

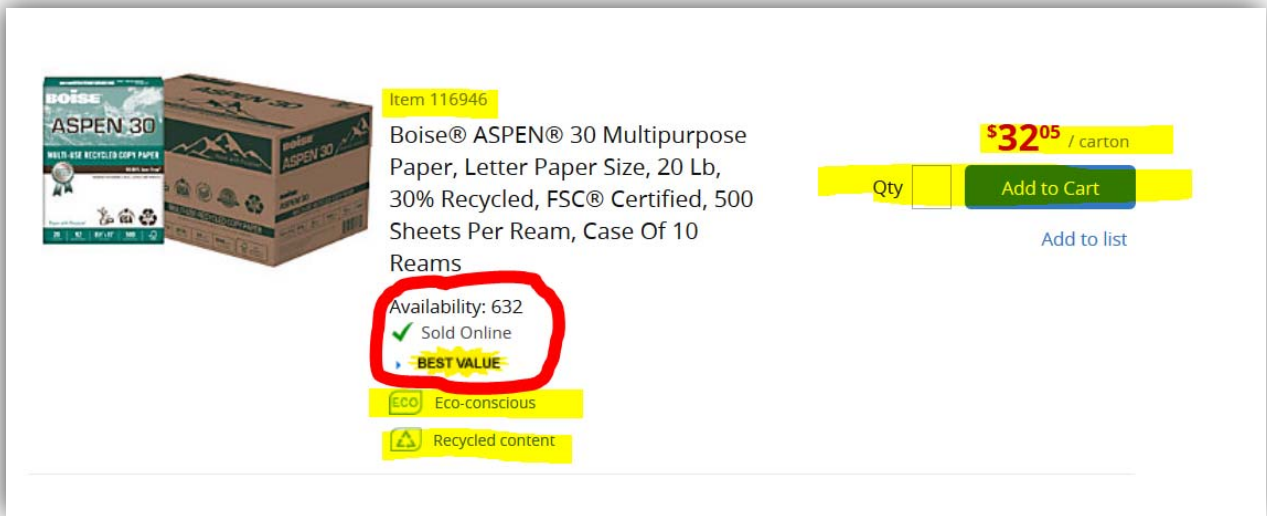


Most suppliers have their products categorized to make finding them easier. You may continue to drill down into the subcategories until you find the product(s) you are looking for.

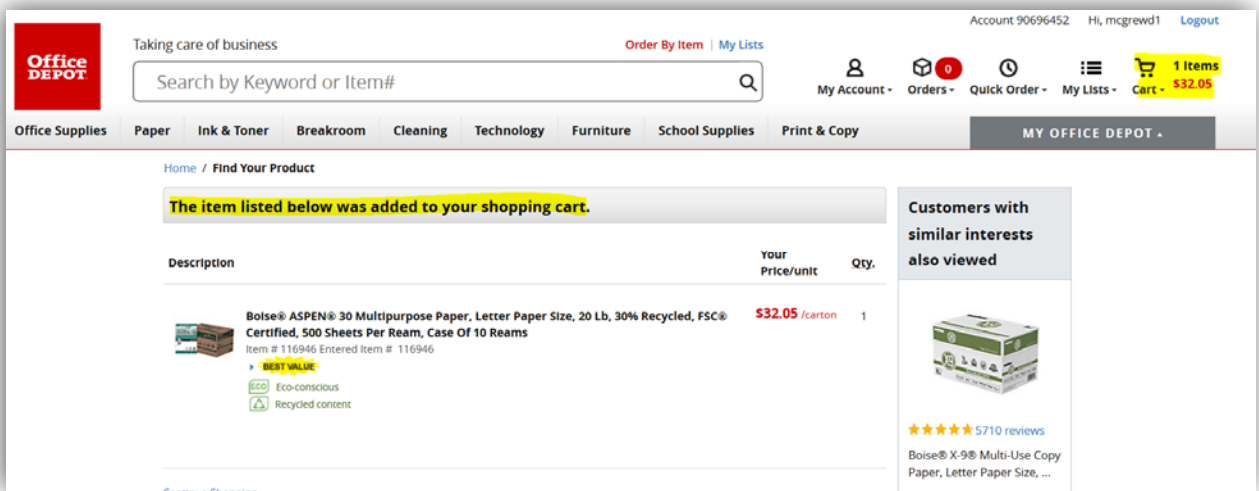


Product information will display, including item number, item description, price, photo, availability, product distinctions, and quantity. Product distinctions may highlight if a product is green, hazardous, or a best value. The product description should also include the number of pieces that are included in a quantity of “1.”

1. When you find an item that you would like to purchase, in the *Quantity* field, enter the desired **Quantity** and click **Add to Cart**.



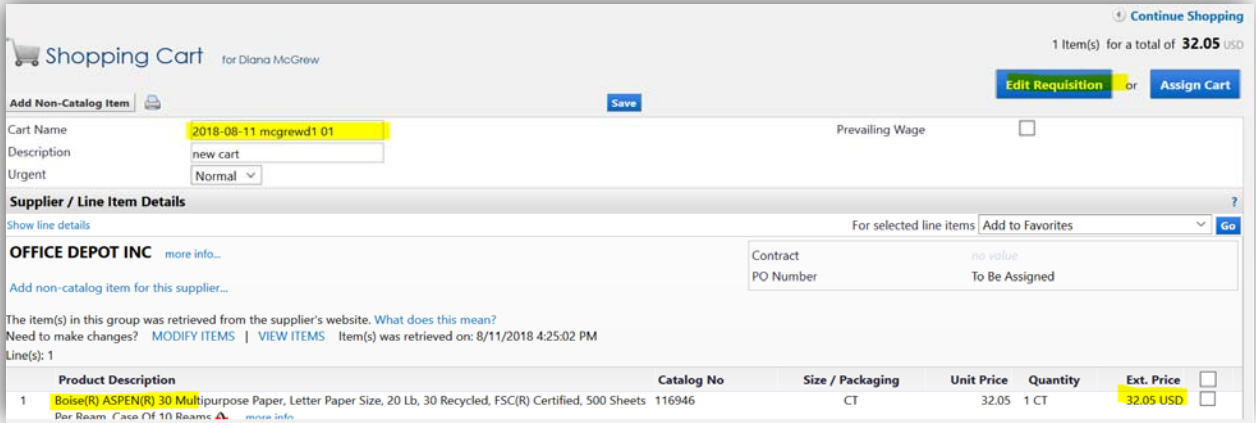
After you add an item to your cart, confirmation will display. Additionally, the cart icon will display the number of items in the cart as well as the cost.



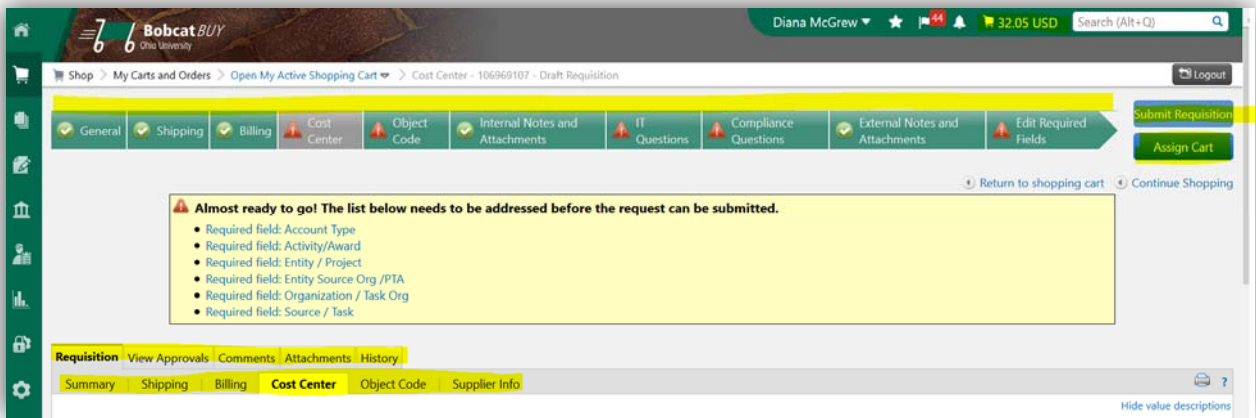
- You may continue shopping, view your cart, or check out. When you have finished shopping, click the **Check Out** button.

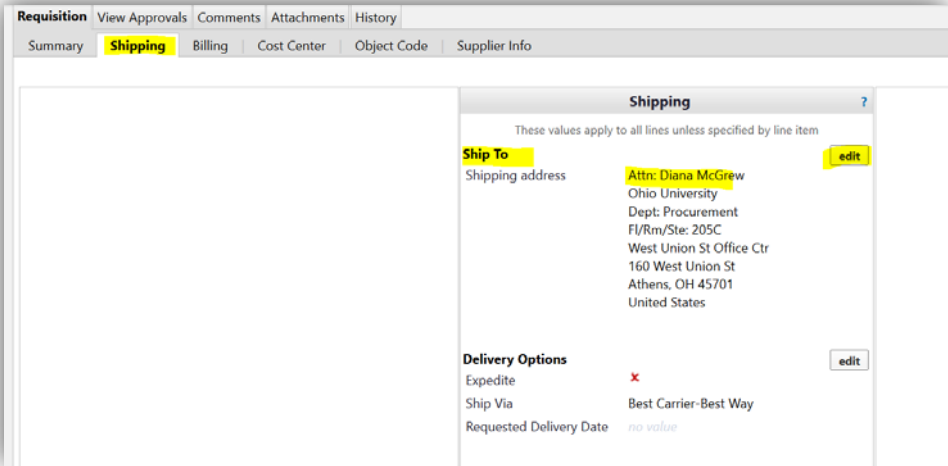



- When you click check out from the supplier’s site, you will return to BobcatBUY and the item(s) will display in your *active* cart. To complete the catalog purchase, click **Edit Requisition**.



Each section in the top green bar has a corresponding tab within the requisition. The ultimate goal is to see all green checkmarks (✓) across the top green bar before submitting your request. **NOTE:** Red explanation points (!) indicate there is an error in that section and/or additional information or action is required.



Tab	Definition
<p>General</p>	<p>The General tab displays the Cart Name, Description, Status, etc. To edit the cart information, click Edit.</p>
<p>Shipping</p>	<p>This is where your default address with auto-populate. The address displayed is what will print on the purchase order (PO). As a result, verify the attention, department, and Fl/Rm/Ste are filled-in as appropriate for delivery.</p> <p>If you would like to select a different address, click Edit. If you setup up multiple shipping addresses in your user profile, click the down arrow and select the desired address. Alternatively, to search for a new address, click Click Here and then click Select from Org Addresses.</p> 
<p>Billing</p>	<p>Most of the time there is no action to be taken on the Billing tab. The <i>Bill To</i> address is Accounts Payables and the <i>Accounting Date</i> will default to today's date. The official accounting date for Oracle will be the date the PO is created. During the months surrounding fiscal year-end close, the accounting date becomes a required field. During this time, users may use the future date of the new fiscal year to setup new POs.</p> 

Tab	Definition
<p>Cost Center</p>	<p>This Cost Center tab is for the accounting string. If you created an accounting code favorite, it will default into these fields. The accounting string is the mechanism that indicates which OHIO organization will pay for the purchase. To populate the fields, click Edit.</p> <div data-bbox="435 478 1356 688" style="text-align: center;"> </div> <p>If you setup an accounting code favorite, but did not specify a default, select from the drop down menu.</p> <p style="text-align: center;">CLICK SELECT FROM ALL VALUES TO ADDING YOUR ACCOUNT STRING.</p> <p>The account string is returned to the field and populates the related fields on the screen. WARNING: If you only enter the <i>Entity Source Org/PTA</i> field, it will not populate the related fields. The Activity/Award Code is a required field for GL accounts and Grants. Award for grants will populate. Activity for GL is based on the event/transaction, so you must manually select the activity. The function is a required field for GL but not for grants; it is not hard coded as a required field. As a result, you must remember to assign a function to your accounting string for GL accounts. If you do not, the Purchase Requisition Validation program will return your requisition with an error code. Once you have selected all of your accounting codes, click Save.</p>

Add Split (Header Level)

A purchase may be split among more than one accounting code. It can be a combination of GL and/or Grants accounting codes. The split is by % only, but it can be a % of quantity or % of amount. By default, accounting codes are at the header level of the requisition. That means all lines within the requisition will use the same accounting code.

1. To split costs for all of the items in the cart, at the Cost Center (header level), click **Edit**.
2. Click **Add Split** to enter the second line. Continue to select add split if you have more than two accounts to charge. The sum of the percentages of all of the lines must equal 100%.
3. Click **Save**.

Add Split (Line Item Level)

Accounting codes can be overridden at the line level. In the line detail of the requisition, you will see the notation *Accounting Codes (same as header)*. To modify this for the line item, click **Edit**.

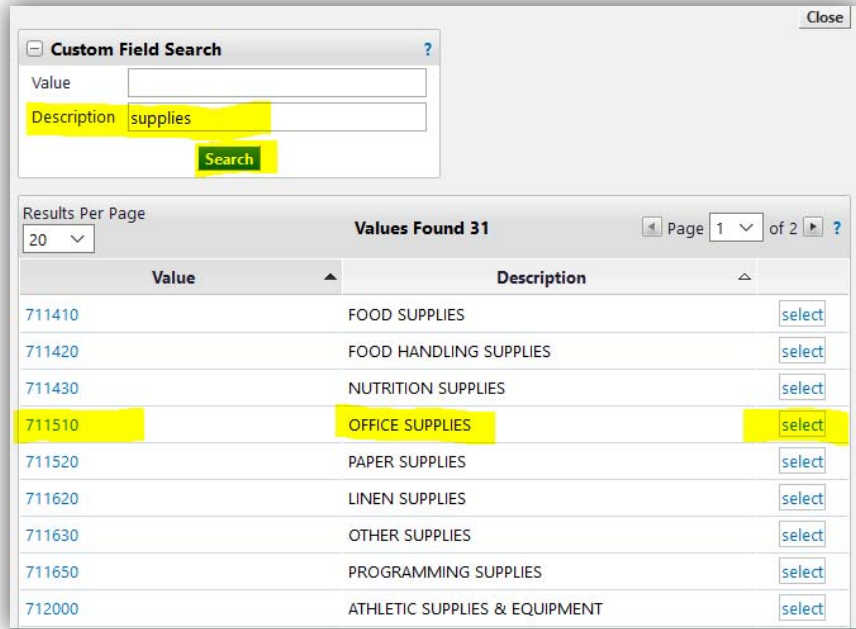
OFFICE DEPOT INC <small>more info...</small>						
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
1 Boise(R) ASPEN(R) 30 Multipurpose Paper, Letter Paper Size, 20 Lb, 30 Recycled, FSC(R) Certified, 500 Sheets Per Ream, Case Of 10 Reams <small>more info...</small>	116946	CT	32.05	1 CT	32.05 USD	<input type="checkbox"/>
Accounting Codes (same as header)						
edit						
Supplier subtotal					32.05 USD	

You may assign accounting codes at the line level just like at the header level. You may select from code favorites, select from all values, and add splits. If you select a different accounting code for a line item, the requisition will display *Values have been overridden for this line*.

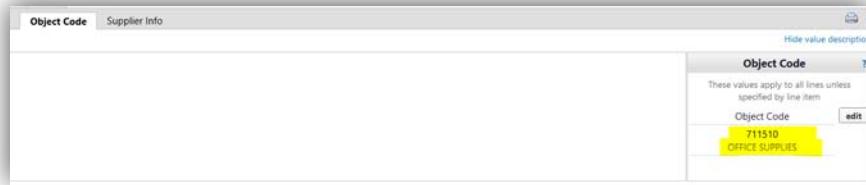
OFFICE DEPOT INC <small>more info...</small>						
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
1 Boise(R) ASPEN(R) 30 Multipurpose Paper, Letter Paper Size, 20 Lb, 30 Recycled, FSC(R) Certified, 500 Sheets Per Ream, Case Of 10 Reams <small>more info...</small>	116946	CT	32.05	1 CT	32.05 USD	<input type="checkbox"/>
Accounting Codes						
values have been overridden for this line						
Account Type	Entity Source Org /PTA	Entity / Project	Source / Task	Organization / Task Org	Activity/Award	Function
General Ledger	10-451600-830035	10	451600	830035	1035	80
General Ledger	GENERAL\FEDERAL	GENERAL	FEDERAL WORKSTUDY	PROCUREMENT	HOMEcomings	GENERAL ADMINISTRATION
edit						

<h3>Object Code</h3>	<p>The object code defines what is being purchased. The object code allows purchases to be categorized (Example: Office Supplies). Click Edit to select from all values.</p>
----------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

You can search by the code or by the description. Purchases are usually expenses so be sure that when searching you select an expense code. They usually start with a 7. When searching by description you may use a key word such as “supplies” to choose from a list of codes. When you find the code that best describes what you are buying, click **Select**.



Object codes may be overridden at the line level too; however, you may only have one object code per line.



IT Questions	IT questions must be answered to determine if additional review is required for the purchase of software, web hosting, and cloud storage.
Compliance Questions	Compliance questions must be answered to determine if additional review is required.
Uniform Guidance	Uniform guidance questions must be answered for purchases using Federal Grant funds.
Click Assign Cart .	

IT Questions

The Office of Information Technology (OIT) no longer reviews every IT purchase as was done in the past. A series of questions were developed to identify high-risk IT purchases, so they can be reviewed and approved prior to purchase. Primary areas of risk include:

- Software,
- Web Hosting
- Cloud Storage

The following questions are designed to determine the level of review needed. Sensitive data and offsite data storage trigger IT security reviews, while the final question determines if an accessibility review is warranted to see if the software meets ADA compliance.

The screenshot shows a form titled "IT Questions" with four questions, each followed by a dropdown menu. The first question is highlighted in yellow and has a red error message that says "Required field". The other three questions are: "Will this Purchase store any sensitive information?", "Will this purchase store data offsite (cloud service)?", and "Will this service be used by more than 50 students or members of the public?". At the bottom of the form are two buttons: "Save" and "Cancel".

1. If you are purchasing software, web hosting, or cloud storage, you must answer “**Yes**” to the first question. Then answer the following three questions
2. If the answer to the first question is “**No**,” there is no need to answer the remaining questions.
3. After answer the questions, click **Save**.

Compliance Questions

Compliance questions were designed for the Affordability & Efficiency (A&E) mandate. If a non-preferred supplier is used for an expense category in which a preferred supplier is required, you must seek an exception. Click here to learn more about the [A&E Exception Process](#).

1. If you are purchasing an item from a non-preferred supplier, for an expense category in which a preferred supplier is required, you must answer “Yes” to the first question.
NOTE: Answering “Yes” to the first question will trigger the approval review from you planning Unit’s Chief Financial and Administrative Officer (CFAO).
2. Complete the additional fields to communicate the request for exception to the CFAO.
3. Due to a character limit, there are two fields for *Justification*. For auditing purposes, enter an official justification reason (for exception).
4. Click **Save**.

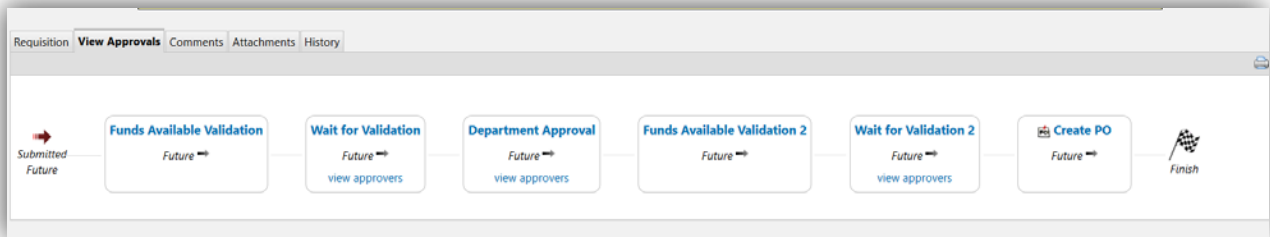
Uniform Guidance

Uniform guidance for purchases using Federal Grant funds has recently changed. The micro-purchase limit of \$10,000 requires the aggregate purchase to be supported by three quotes up to the bid threshold of \$50,000.

1. Answer the Uniform Guidance question. If you answer “Yes,” the requisition will route to Grants Accounting for review regarding compliance with the micro-purchase requirements.
2. Click **Save**.

Approval Workflow

Each of the questions (IT, Compliance, and Uniform Guidance) could trigger additional steps in BobcatBUY’s workflow; however, the typical workflow only requires departmental approval. The validation steps ensure a valid accounting code was used.



Department Approval

Requesters

- Requesters are assigned at the organization level.
- If the requisition is less than or equal to (\leq) \$1500, it routes to the Requester.
- The Requester reviews and approves the requisition.
- A Requester may self-approve a requisition up to \$1499.99.

Approvers

- Approvers are assigned at the organization level.
- If the requisition is greater than or equal to (\geq) \$1500, it routes to the Approver #1.
- The Approver #1 reviews and approves the requisition.
- A requisition over \$10,000.00 must be reviewed and approved by the Approver #2.

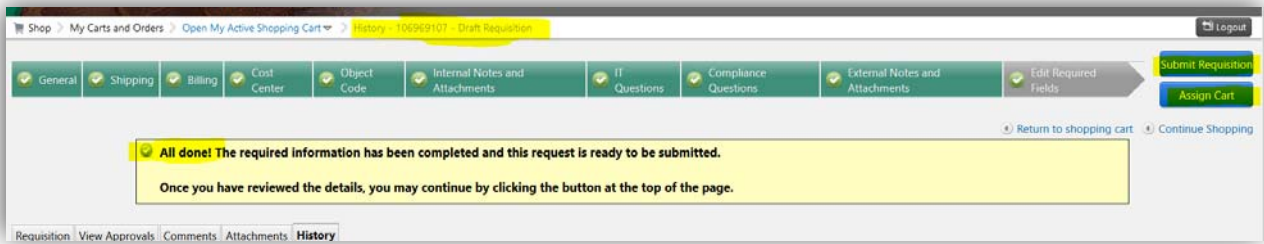
Requisition History

All changes, approvals, and actions are captured with user name and timestamp in the **History** tab of the requisition. Here, you may follow the requisition workflow from creation to approval.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	8/11/2018 5:14 PM	Diana McGrew		Requisition modified	Does the purchase total \$10,000 or greater on a federal award?	empty	NO	
	8/11/2018 5:14 PM	Diana McGrew		Requisition modified	Does this purchase require A&E Purchasing Exception?	empty	NO	
	8/11/2018 5:14 PM	Diana McGrew		Requisition modified	Does this cart include the purchase of technology (Software,cloud storage)?	empty	NO	
	8/11/2018 5:08 PM	Diana McGrew		Requisition modified	Object Code	empty	711510	
Line 1	8/11/2018 5:04 PM	Diana McGrew		Requisition modified	Activity/Award	0000	1035	
Line 1	8/11/2018 5:04 PM	Diana McGrew		Requisition modified	Source / Task	100000	451600	
Line 1	8/11/2018 5:04 PM	Diana McGrew		Requisition modified	Entity Source Org /PTA	10-100000-830035	10-451600-830035	
	8/11/2018 5:04 PM	Diana McGrew		Requisition modified	Function	empty	80	
	8/11/2018	Diana McGrew		Requisition modified	Activity/Award	empty	0000	

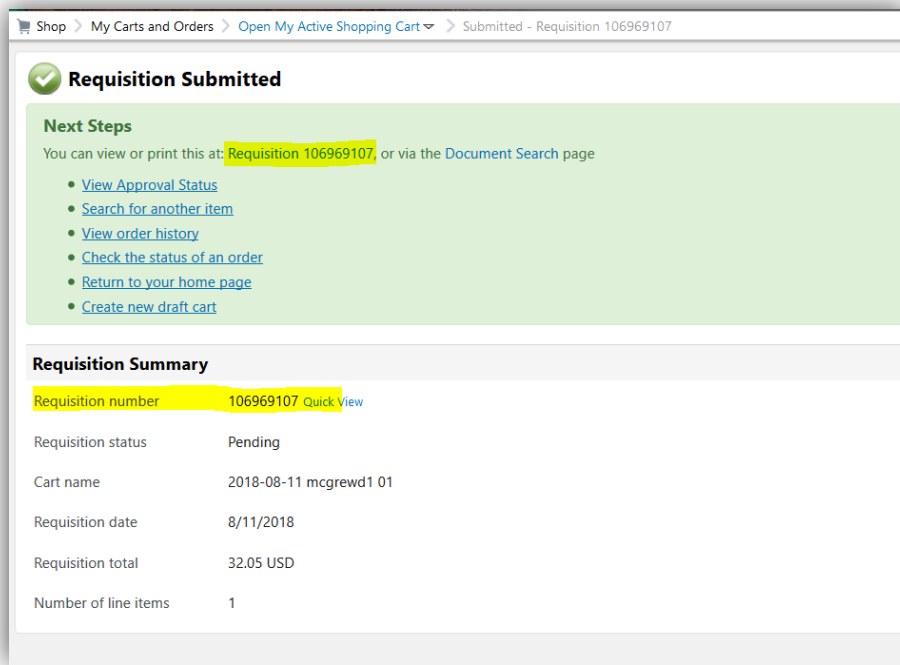
Assign Cart or Submit Requisition

1. After completing all of the necessary information, on the requisition, verify there are green checkmarks (✓) across the top green bar.
2. If you are a shopper (user role), click **Assign Cart** to assign your cart to your authorized requester. **NOTE:** If your request is less than \$1500, once your requester submits (approves) your request, it is sent directly to the supplier as a PO.
3. If you are a requester (user role), click **Submit Requisition**.



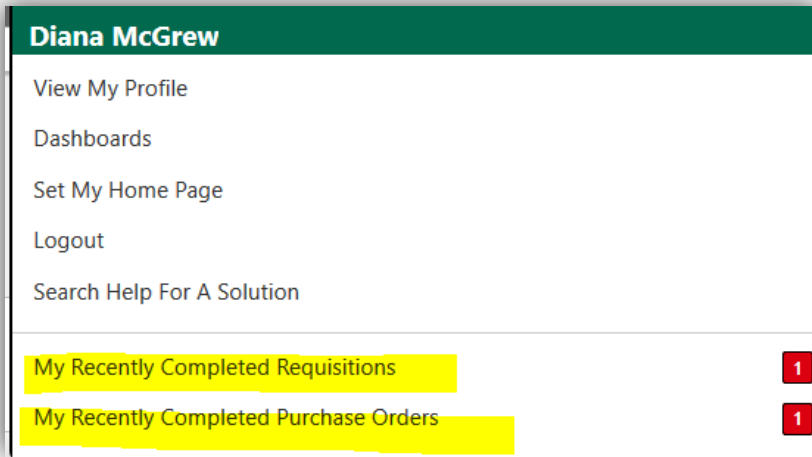
- The shopper assigns the completed shopping cart to the requester for review.
- The requester submits the cart, which becomes a requisition.

Once a requisition is assigned/submitted, a confirmation will display. It will include the Requisition Number.



Requisition Status

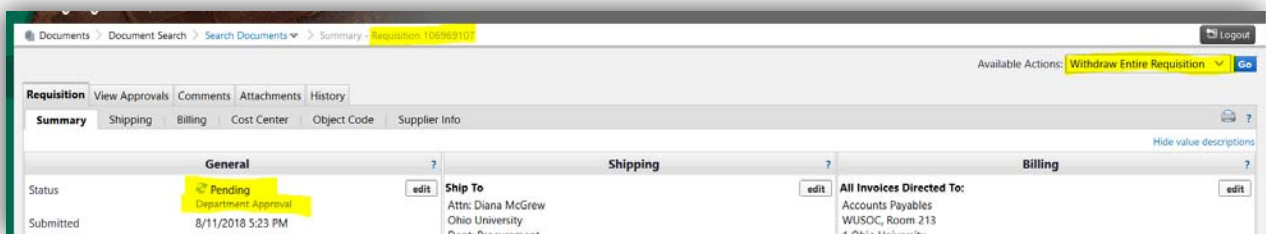
You may also view recent activity under **(Your) Name** in the right top ribbon.



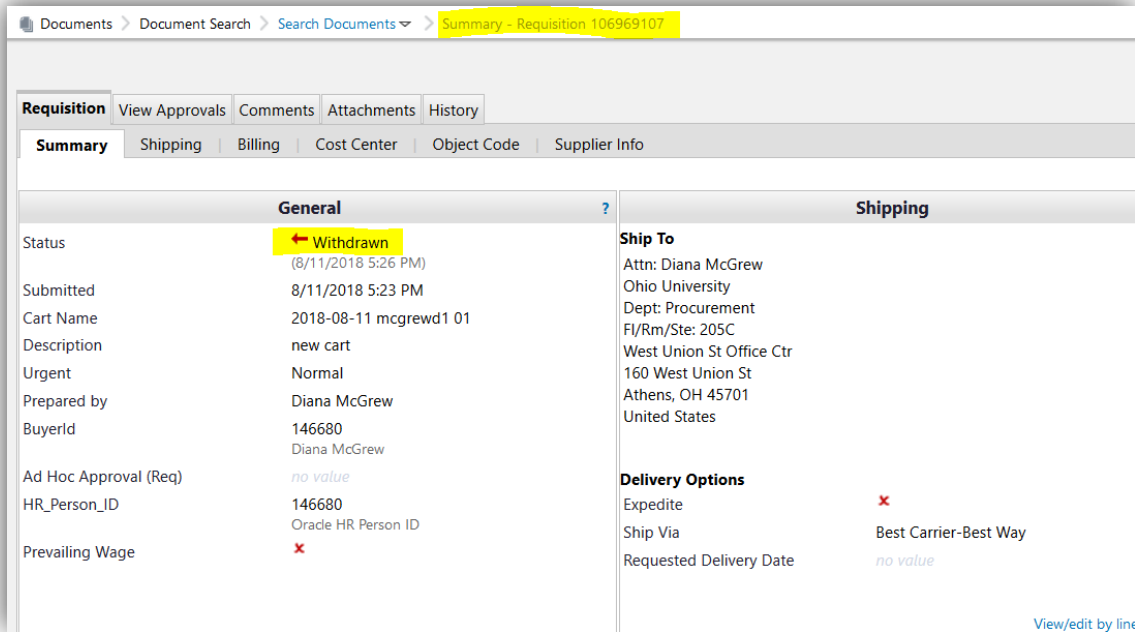
The requisition will display the status of where it is in the process. Pending status means it is still being reviewed in workflow. The workflow step is identified along with the person's name to which the requisition is assigned.

Withdraw Requisition

If for some reason the requisition needs to be called back from processing, the originator of the requisition may withdraw the requisition.



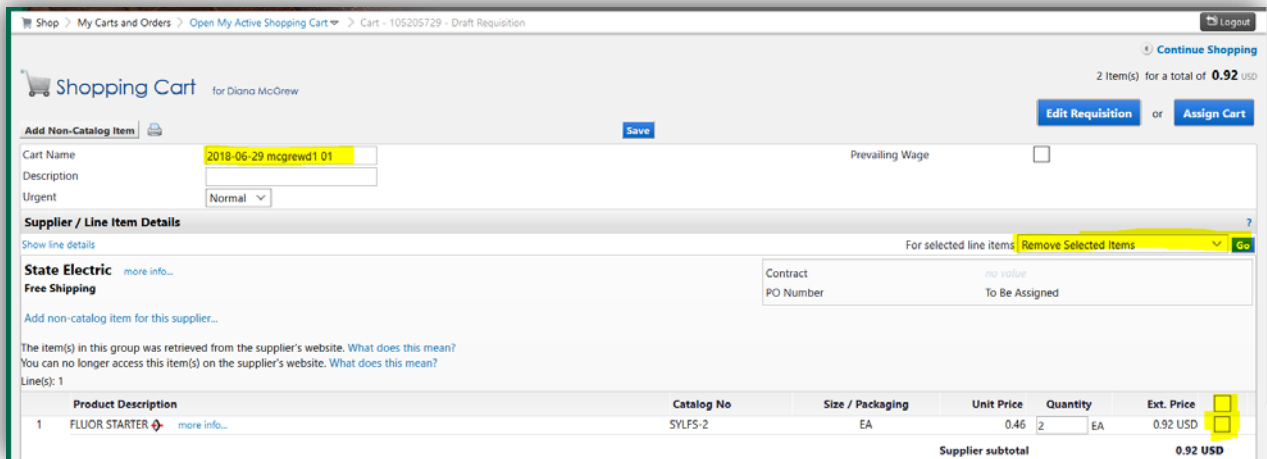
1. To withdraw the requisition, on the requisition under *Available Actions*, click **Withdraw Entire Requisition** and click **Go**. The status now shows the requisition as withdrawn. The requisition will return to the originator's cart.



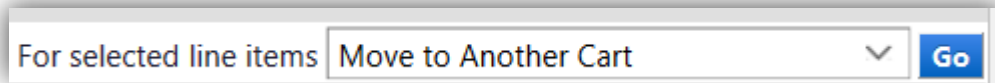
Remove Selected Items

Within the cart functionality, there are other actions available that are useful when managing your cart.

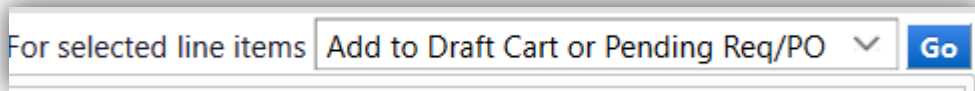
1. If you have items to delete, click the checkbox located to the right of the item to select it.
2. In the *For Selected Line Items* field, click **Remove Selected Items** and click **Go**.
3. If you want to select all items, click the checkbox at the top of the section where all items are located. *In the For Selected Line Items field, click **Remove Selected Items** and click **Go**.*



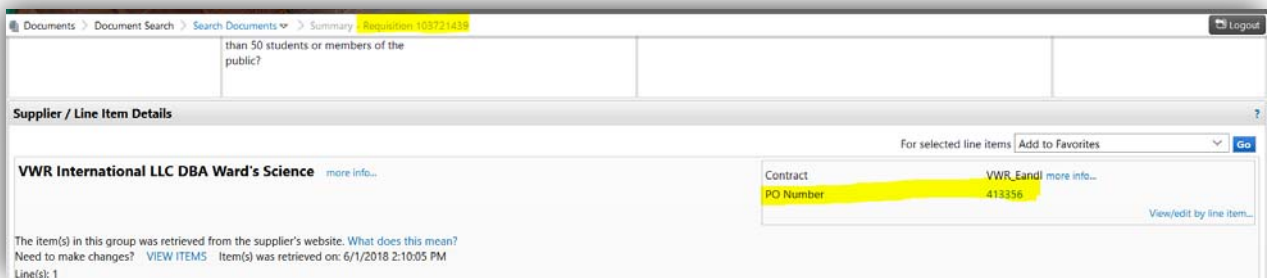
Another useful action is if you want to move an item to another cart. Select the item(s) to move and choose the action **Move to Another Cart** and click **Go**.



To save time, you can copy an existing item from a requisition to a draft cart. For example, if you want to purchase the item again. From the existing requisition, select the item(s) to copy and choose the action **Add to Draft Cart or Pending Req/PO** and click **Go**.



When a requisitions is processed successfully, a PO is created and the requisition status changes to complete. The PO number is referenced on the requisition. Likewise, the requisition is referenced on the PO and each will link to the other document.

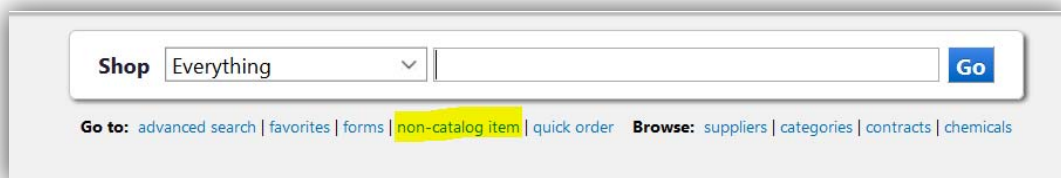


NOTE: All of the information regarding managing carts is applicable to all carts, regardless of the form used to create the purchase.

Example 2: Non-Catalog Requisition with Supplier Setup

A non-catalog item may be used when an item is not available through one of OHIO’s preferred supplier catalogs.

1. From BobcatBUY’s main page, click the **Non-catalog Item** link.



2. You may select the supplier from the supplier search. If the supplier you wish to purchase from is not setup, in the *Enter Supplier* field, enter **NOT AVAILABLE**. This will trigger the

requisition to route to Purchasing’s Supplier Management to be setup. The proper supporting documentation (Supplier/Payee Information Form and W9) for supplier setup must be uploaded to the requisition as an *attachment*.

The screenshot shows a web form titled "Non-Catalog Item". At the top, there is a field "Enter Supplier" with a yellowed-out value and a link "or Supplier Search". Below this is a table with columns: "Brief Description of Service", "Catalog No.", "Quantity", "Price Estimate", and "UOM". The "Brief Description of Service" field is yellowed out, and below it is a character count "254 characters remaining" and "expand | clear" link. Under "Product Details", there is a "Commodity Code" field and a list of hazard categories with checkboxes: "Controlled substance", "Recycled", "Hazardous material", "Radioactive", "Radiation Generating Equipment", "Select Agent", "Toxin", "Energy Star", and "Green". At the bottom, there are three buttons: "Save and Close", "Save and Add Another", and "Close".

3. Additionally, a quote from the supplier must accompany the non-catalog form as an *attachment*.
4. Complete the form with the information from the quote. **NOTE:** Create a separate line item for each line item on the quote.

Non-Catalog Item ? X

NOT AVAILABLE [select different supplier](#)

Street, City, State 99999

Distribution Methods
Email (HTML Attachment)

Brief Description of Service	Catalog No.	Quantity	Price Estimate	UOM
buy stuff	123	1	50	EA

245 characters remaining [expand](#) | [clear](#)

Product Details

Commodity Code

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Radiation Generating Equipment
- Select Agent
- Toxin
- Energy Star
- Green

[Save and Close](#) [Save and Add Another](#) [Close](#)

5. Select a *Commodity Code* that best defines the item you are purchasing. Similar to the the object code, the commodity code is another way that purchases are categorized and analyzed.

Mozilla Firefox

https://solutions.sciquest.com/apps/ 67%

Commodity Code Search ?

Code starts with...

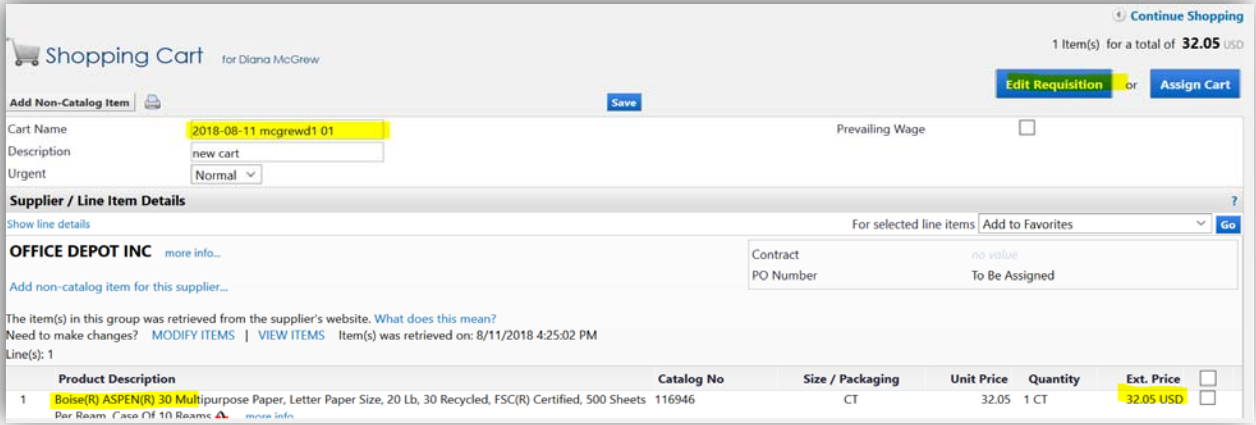
Description contains...

[Search](#)

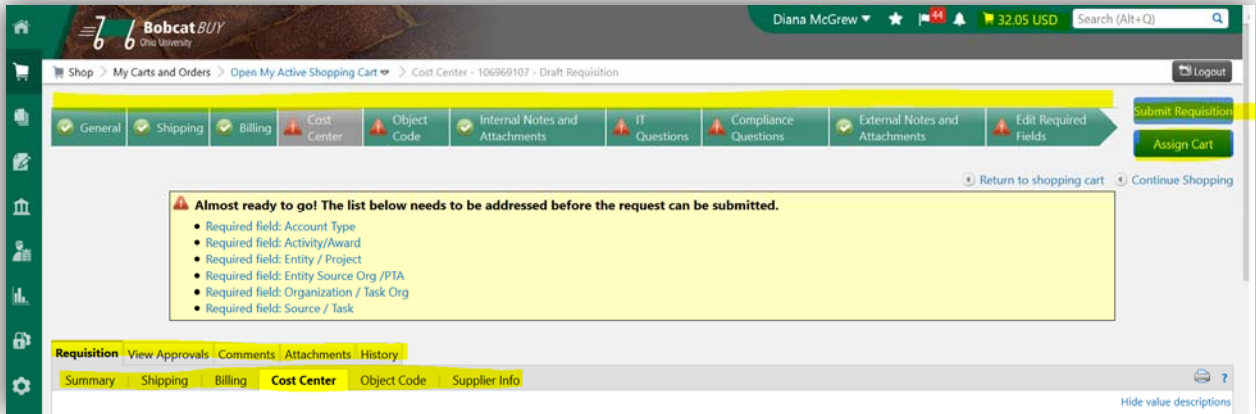
Results Per Page 20 Results 5 Page 1 of 1 ?

Code	Description	
66	Athletic Supplies	select
81	Electronic Supplies	select
564	Instructional Supplies	select
529	Laboratory/Medical Equipment & Supplies	select
535	Office Equipment & Supplies	select

6. When you have finished completing the form, click **Save and Close**. The information will be saved to your active cart. You must review the cart just like the catalog requisition and verify there are.
7. To complete the Non-catalog Item purchase, click **Edit Requisition**.



Each section in the top green bar has a corresponding tab within the requisition. The ultimate goal is to see all green checkmarks (✓) across the top green bar before submitting your request. **NOTE:** Red explanation points (!) indicate there is an error in that section and/or additional information or action is required.



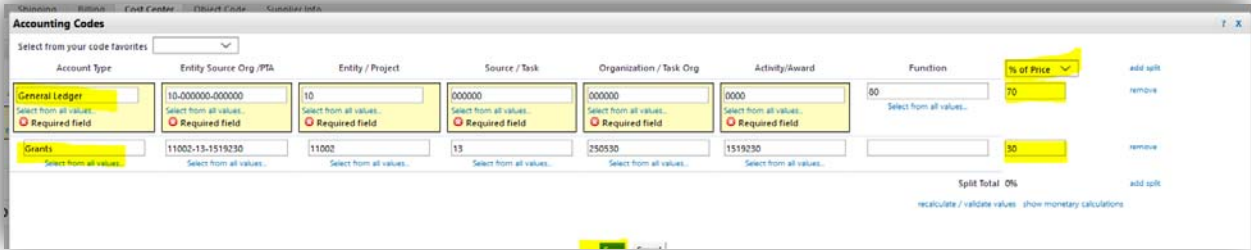
Tab	Definition
General	The General tab displays the Cart Name, Description, Status, etc. To edit the cart information, click Edit .
Shipping	This is where your default address with auto-populate. The address displayed is what will print on the purchase order (PO). As a result, verify the Attention, Department, and FI/Rm/Ste are filled-in as appropriate for delivery.

Tab	Definition
	If you would like to select a different address, click Edit . If you setup up multiple shipping addresses in your user profile, click the down arrow and select the desired address. Or to search for a new address, click Click Here and then click Select from Org Addresses .
Billing	Most of the time there is no action to be taken on the Billing tab. The <i>Bill To</i> address is Accounts Payables and the <i>Accounting Date</i> will default to today's date. The official accounting date for Oracle will be the date the PO is created. During the months surrounding fiscal year-end close, the accounting date becomes a required field. During this time, users may use the future date of the new fiscal year to setup new POs.
Cost Center	<p>This Cost Center tab is for the accounting string. If you created an accounting code favorite, it will default into these fields. The accounting string is the mechanism that indicates which OHIO organization will pay for the purchase. To populate the fields, click Edit.</p> <p>If you setup an accounting code favorite, but did not specify a default, select from the drop down menu.</p> <p style="text-align: center;">CLICK SELECT FROM ALL VALUES TO ADDING YOUR ACCOUNT STRING.</p> <p>The account string is returned to the field and populates the related fields on the screen. WARNING: If you only enter the <i>Entity Source Org/PTA</i> field, it will not populate the related fields. The Activity/Award Code is a required field for GL accounts and Grants. Award for grants will populate. Activity for GL is based on the event/transaction, so you must manually select the activity. The function is a required field for GL but not for grants; it is not hard coded as a required field. As a result, you must remember to assign a function to your accounting string for GL accounts. If you do not, the Purchase Requisition Validation program will return your requisition with an error code. Once you have selected all of your accounting codes, click Save.</p>

Add Split (Header Level)

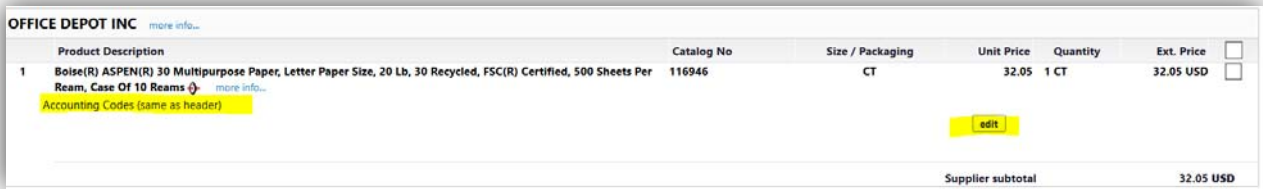
A purchase may be split among more than one accounting code. It can be a combination of GL and/or Grants accounting codes. The split is by % only, but it can be a % of quantity or % of amount. By default, accounting codes are at the header level of the requisition. That means all lines within the requisition will use the same accounting code.

1. To split costs for all of the items in the cart, at the Cost Center (header level), click **Edit**.
2. Click **Add Split** to enter the second line. Continue to select add split if you have more than two accounts to charge. The sum of the percentages for all the lines must equal 100%.
3. Click **Save**.

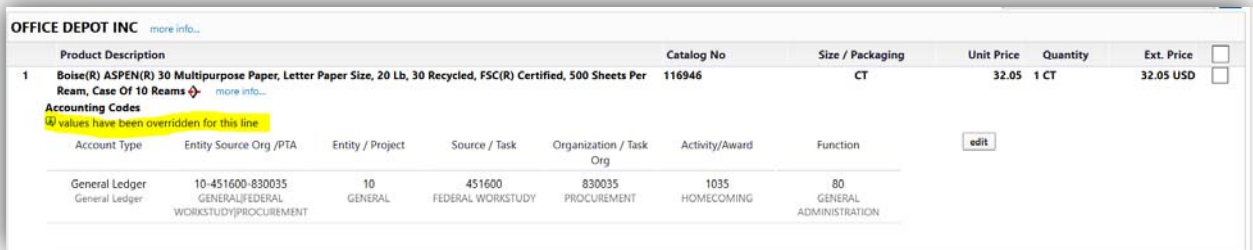


Add Split (Line Item Level)

Accounting codes can be overridden at the line level. In the line detail of the requisition, you will see the notation *Accounting Codes (same as header)*. To modify this for the line item, click **Edit**.



You may assign accounting codes at the line level just like at the header level. You may select from code favorites, select from all values, and add splits. If you select a different accounting code for a line item, the requisition will display *Values have been overridden for this line*.



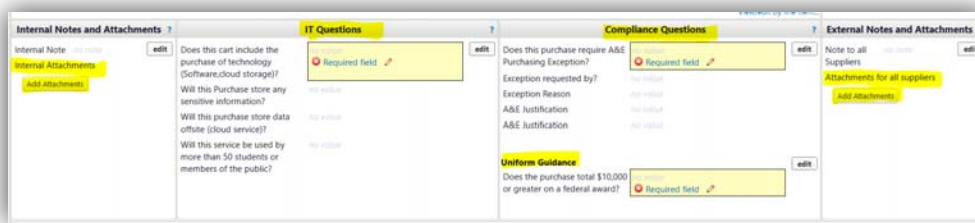
<p>Object Code</p>	<p>The object code defines what is being purchased. The object code allows purchases to be categorized (Example: Office Supplies). Click Edit to select from all values.</p> <p>You can search by the code or by the description. Purchases are usually expenses so be sure that when searching you select an expense code. They usually start with a 7. When searching by description you may use a key word such as “supplies” to choose from a list of codes. When you find the code that best describes what you are buying, click Select.</p>
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	Object codes may be overridden at the line level too; however, you may only have one object code per line.
Internal Notes and Attachments	Users may upload attachments for both internal and external use. Internal attachments are for review within the University. Unsigned contracts, supporting documentation, and approval communications are among the types of documents typically uploaded as an internal attachment.
IT Questions	IT questions must be answered to determine if additional review is required for the purchase of software, web hosting, and cloud storage.
Compliance Questions	Compliance questions must be answered to determine if additional review is required.
Uniform Guidance	Uniform guidance questions must be answered for purchases using Federal Grant funds.
External Notes and Attachments	Users may upload attachments for both internal and external use. External attachments will be sent to the supplier when the PO is created. Fully executed agreements and quotes are the primary documents typically uploaded as external attachments. This is OHIO’s way of supporting the PO amount and scope of work expected from the supplier.
Click Assign Cart .	

Attachments

On the summary tab of the draft requisition, in the middle section, you will find sections for adding attachments, and answering questions have been developed to determine if additional OHIO review is needed in certain situations.

You may upload attachments for both internal and external use. Internal attachments are for review within the University. Unsigned contracts, supporting documentation, and approval communications are among the types of documents typically uploaded as an internal attachment. External attachments are attachments that will be sent to the supplier when the PO is created. Fully executed agreements and quotes are the primary documents typically uploaded as external attachments.



1. To add an attachment, click **Add Attachment**.

- You may browse your computer files to upload a file as either internal or external.
NOTE: PDF is the recommended file format for attachments. The maximum file size is 9.54 MB.
- Once you have selected the PDF file, verify it is fully uploaded and click **Save Changes**.

Add Attachments

Attachment Type File Link

File [★]

Select files...

Maximum upload file size: 9.54 MB

[★] Required Save Changes Close

NOTE: You may change a file attachment from external to internal or vice versa by **right-clicking** on the attachment and selecting **Move to internal/external documents**.

IT Questions

The Office of Information Technology (OIT) no longer reviews every IT purchase as was done in the past. A series of questions were developed to identify high-risk IT purchases, so they can be reviewed and approved prior to purchase. Primary areas of risk include:

- Software,
- Web Hosting
- Cloud Storage

The following questions are designed to determine the level of review needed. Sensitive data and offsite data storage trigger IT security reviews, while the final question determines if an accessibility review is warranted to see if the software meets ADA compliance.

1. If you are purchasing software, web hosting, or cloud storage, you must answer “Yes” to the first question. Then answer the following three questions
2. If the answer to the first question is “No,” there is no need to answer the remaining questions.
3. After answer the questions, click **Save**.

Compliance Questions

Compliance questions were designed for the Affordability & Efficiency (A&E) mandate. If a non-preferred supplier is used for an expense category in which a preferred supplier is required, you must seek an exception. Click here to learn more about the [A&E Exception Process](#).

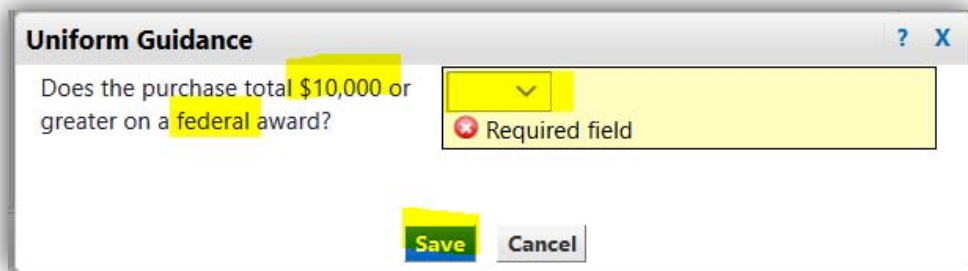
1. If you are purchasing an item from a non-preferred supplier, for an expense category in which a preferred supplier is required, you must answer “Yes” to the first question.

NOTE: Answering “Yes” to the first question will trigger the approval review from you planning Unit’s Chief Financial and Administrative Officer (CFAO).

2. Complete the additional fields to communicate the request for exception to the CFAO.
3. Due to a character limit, there are two fields for *Justification*. For auditing purposes, enter an official justification reason (for exception).
4. Click **Save**.

Uniform Guidance

Uniform guidance for purchases using Federal Grant funds has recently changed. The micro-purchase limit of \$10,000 requires the aggregate purchase to be supported by three quotes up to the bid threshold of \$50,000.

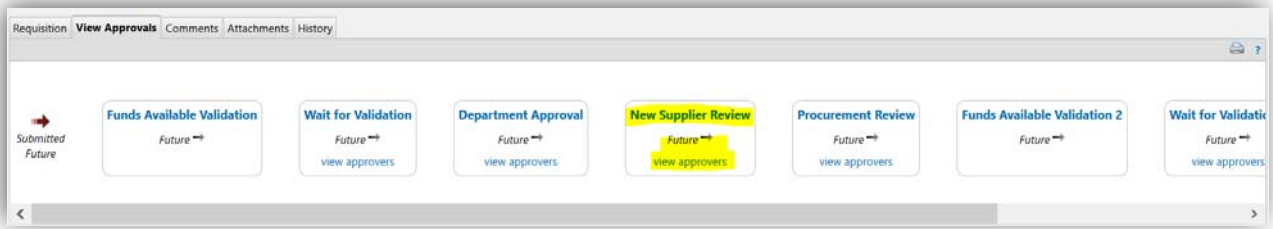


1. Answer the Uniform Guidance question. If you answer “Yes,” the requisition will route to Grants Accounting for review regarding compliance with the micro-purchase requirements.
2. Click **Save**.

Assign Cart or Submit Requisition

1. After completing all of the necessary information, on the requisition, verify there are green checkmarks (✓) across the top green bar.
2. If you are a shopper (user role), click **Assign Cart** to assign your cart to your authorized requester. **NOTE:** If your request is less than \$1500, once your requester submits (approves) your request, it is sent directly to the supplier as a PO.
3. If you are a requester (user role), click **Submit Requisition**.

When the request is assigned/submitted, click the **View Approvals** tab. A new step will display in the workflow showing the request will route to Supplier Management for supplier setup.



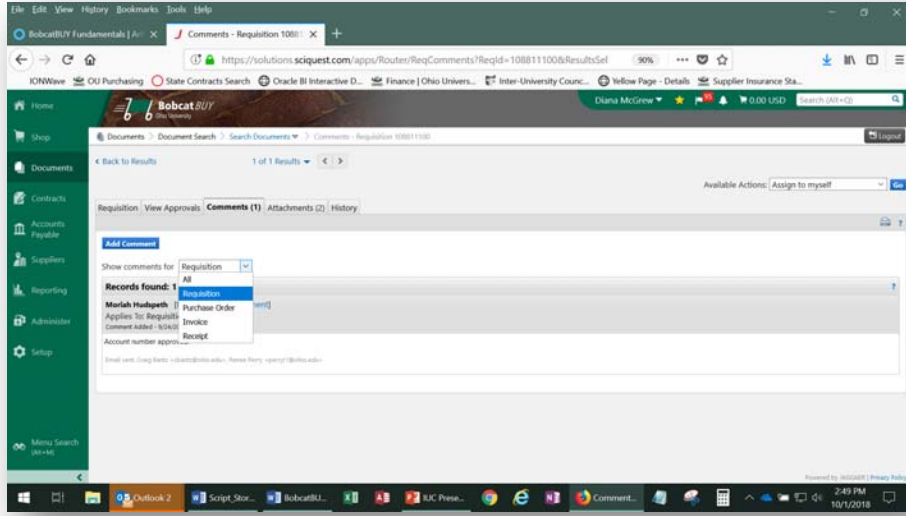
Comments

Comments allow you to communicate with other BobcatBUY users involved in the requisition process. Comments are visible to everyone throughout the purchasing process. To ensure the intended recipient receives the comment, you may select them as an email recipient. The recipient will receive an email notification including a link to the comment.

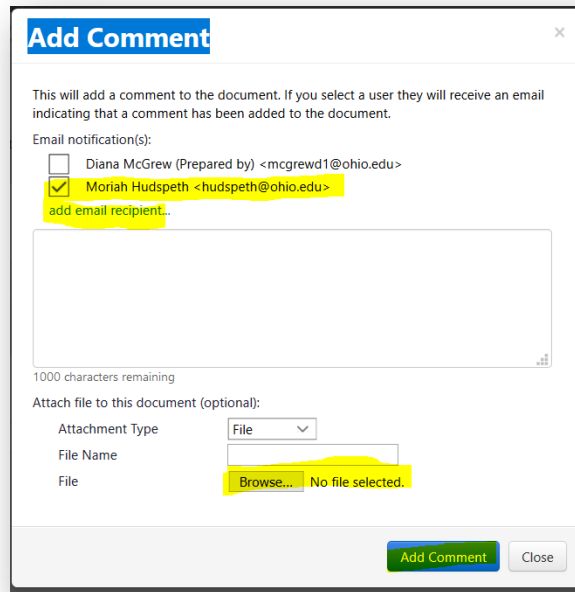
1. To view comments, click the **Comments** tab.



- You may view comments for each document type or click to select **All**.



- To add a comment, click the **Add Comment** button.



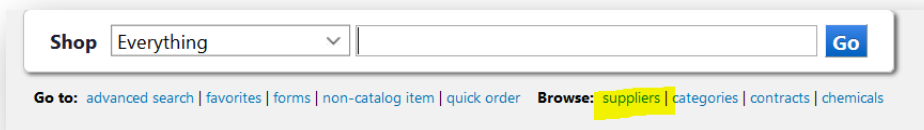
- If a person has taken action on the requisition, their name will automatically display. If you would like to send the comment to a specific person, click the checkbox next to the appropriate person's name. You may also click the **Add an Email Recipient** link and search by name. **NOTE:** The recipient must be an active BobcatBUY user.
- Enter your comment text. **NOTE:** The comment field is limited to 1000 characters.

- To attach a file to your comment, click **Browse**. Navigate to where the file is saved and click to select the appropriate file. PDF is the recommended file format for attachments. The attachment will be added as an internal attachment.
- Click **Add Comment**.

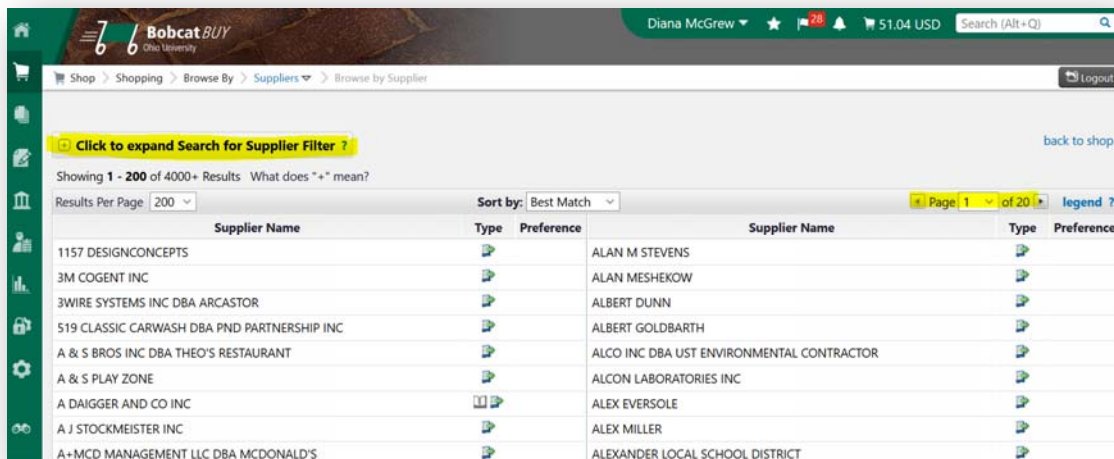
SUPPLIER SEARCH

There are two ways to search for a supplier in BobcatBUY. The first option will only show active suppliers; the other will show both active and inactive suppliers.

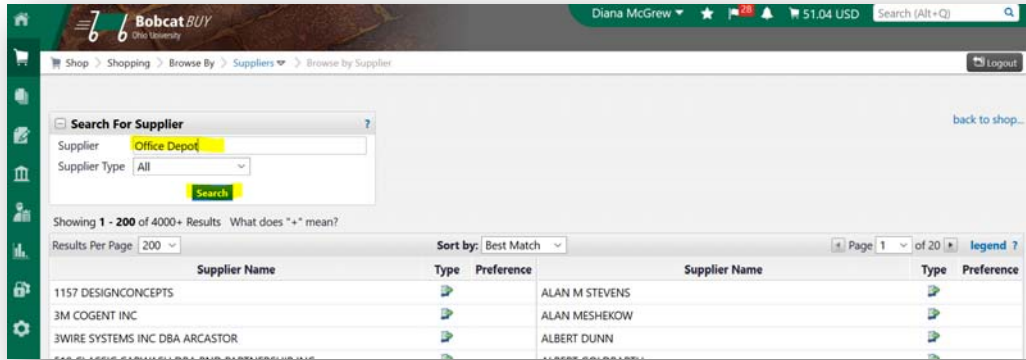
- To see active suppliers, from the main page, in the *Browse* section under *Shop Everything*, click **Suppliers**. This search will return an alphabetical listing of all active suppliers.



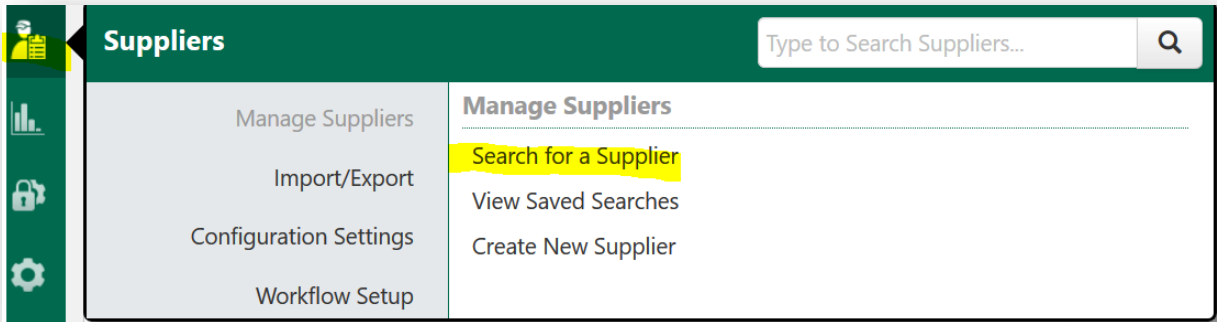
- You can look through multiple pages to find the desired supplier, or you may **Click to expand Search for Supplier Filter**.



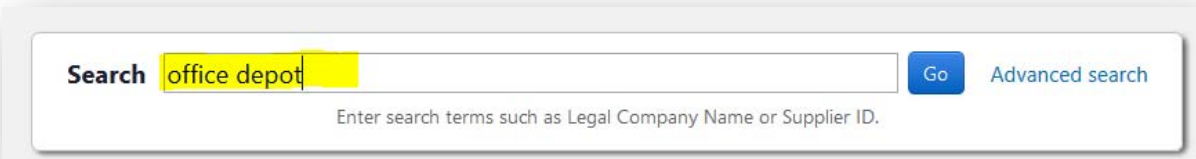
- In the filter, enter any portion of the suppliers name and it will return the results that match your search criteria. Example: Enter "Depot" and click **Search**.



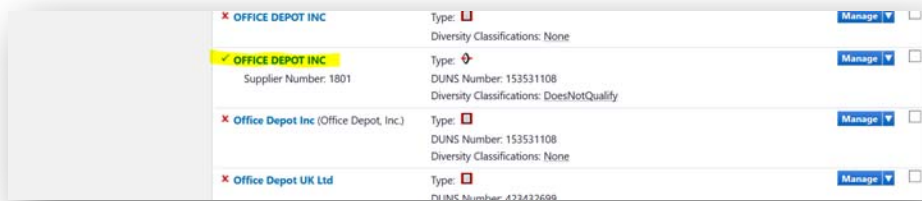
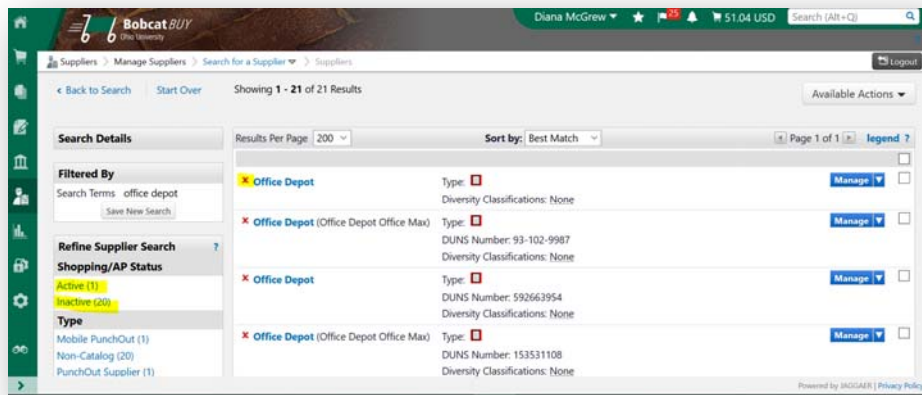
- The second way to search for a supplier is using the Supplier icon. In the left vertical ribbon, click the **Supplier** icon, trace to *Manage Suppliers*, and click **Search for a Supplier**.



- In the *Search* field, enter any portion of the suppliers name and it will return the results that match your search criteria. Example: Enter “Office Depot” and click **Go**.



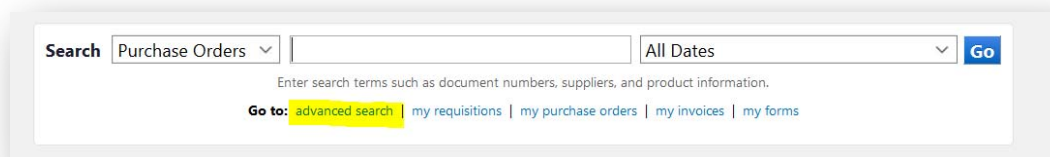
NOTE: There are 21 suppliers that match Office Depot. On the left, the display indicates there is 1 active supplier and 20 inactive suppliers. The active supplier is displayed with a green check mark. Suppliers are deactivated when they become invalid.



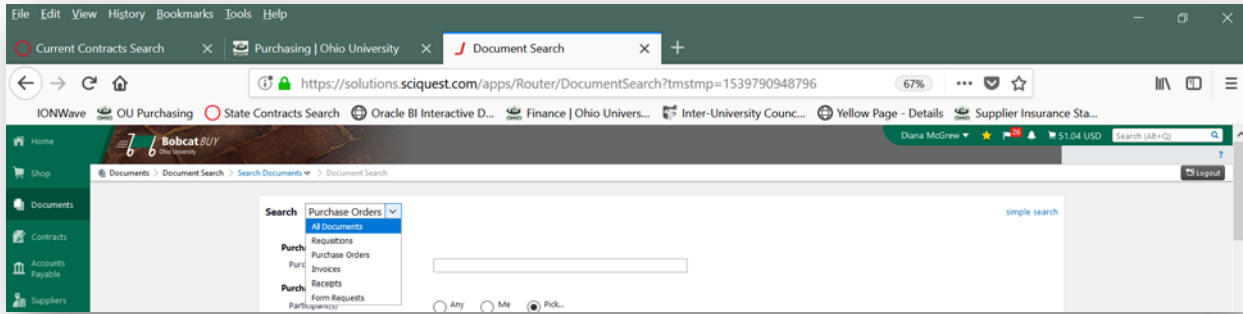
DOCUMENT SEARCH

All transactions within BobcatBUY are assigned a document number. There are two ways to search for a document number:

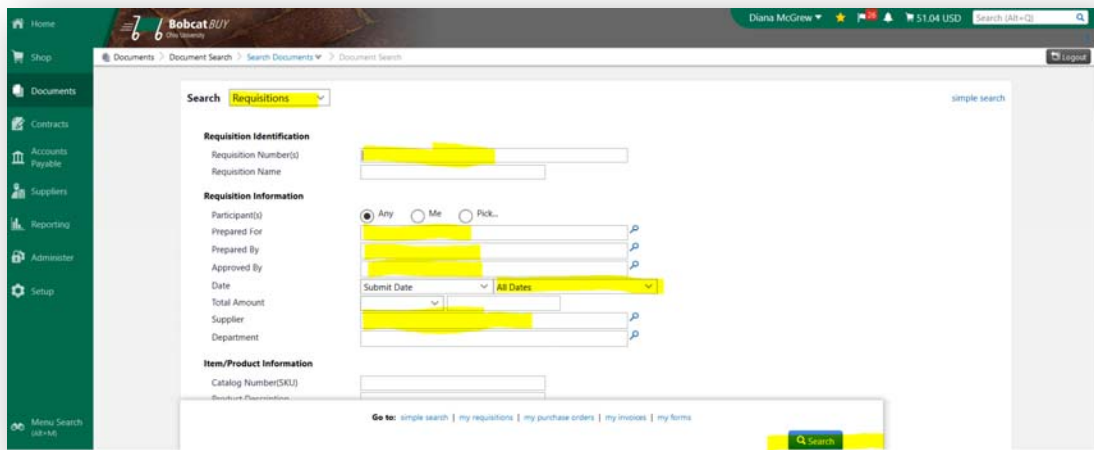
1. In the left vertical ribbon, click the **Documents** icon, enter the *document number*, and click **Search**.
2. To search using other criteria, from the main page, in the *Go to* section click **Advanced Search**. Advanced search will allow you to search by a particular document type. Each document type has different search parameters.



3. For requisitions, some common search parameters include: supplier, date, and the user that either prepared the requisition or approved it. Additionally, there are several date parameters to choose from or you may select a specific date or date range.



4. Selected the desired search parameters and click Search.



BobcatBUY will display a list of documents that match your search criteria. The number of results as well as the number of pages will display. You may drill-down to the individual document to view the details. You may edit your search or start a new search.

