



Purpose

The purpose of this Quick Reference Guide (QRG) is to acquaint users with the new look and feel of the new BobcatBUY user interface (BCB UI). The UI enhancements are being implemented to give BCB a cleaner, more open look and feel. Most of the enhancements do not affect the functionality of the system, they only affect the layout of the screen and the look and feel of the system. The biggest change is the move from a tabbed view to a scrolling view.

Universal Icons

Regardless of where you find these icons in BCB, the functionality is the same.









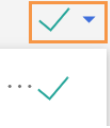
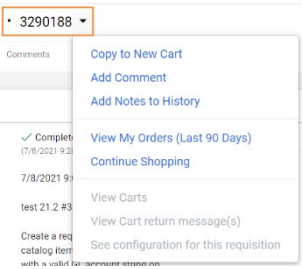
		
<p>Show/ Hide Sidebar – Click to show or hide the right sidebar</p>	<p>Filter View – Isolate specific sections to view; if you want to see one specific aspect, this will show it to you</p>	<p>Print – Opens print view of screen</p>
<p>General  </p>		
<p>Hide/Show Optional Fields – this is a one-time only action</p>	<p>Edit – Click this icon anytime you would like to add/edit info</p>	<p>Show Section – This shows that the section is open; click to close. This view will be maintained throughout the process</p>
		
<p>Hidden Section – This shows that the section is closed; click to open. This view will be maintained throughout</p>	<p>Actions drop down – Make sure the check is in the box to enable the actions dropdown</p>	<p>Cart/Requisition/PO/Invoice Numbers – Available actions have been moved to this drop down</p>

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System Tour

Welcome!

It looks like you're new here. We'd like to give you a quick tour to introduce you to some of our new features, if you're interested.

Step-by-Step Tour

Walk through a tour highlighting important features Yes No

Show this again Yes No

Video

Heads up! This video will open in a pop-up window. If you use a pop-up blocker, please ensure it does not block this.

Watch a video explaining how to use this page Yes No

Show this again Yes No

[Show me!](#) [Maybe next time](#)

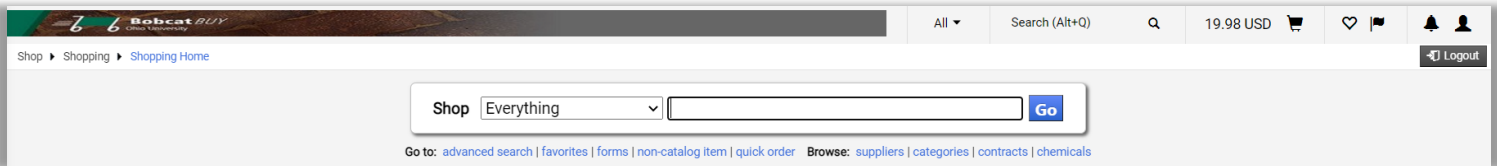
When you log into BobcatBUY on July 26, you will be welcomed with a new pop-up window. You may select to see a step-by-step tour and/or a video about the new user interface. If you select the No radio button to the Show me this again prompt, you will no longer see this popup window in the future. You may also bypass this window for the time being by clicking the Maybe next time button.

If you select No to the Show this again question, you will no longer see this pop-up window. To turn it back on, click the profile drop down at the top right of the screen and select View My Profile. When your profile opens, select the Guided Tour Instructions on the left menu under your name. Click the Edit Section link to update your response to the questions.

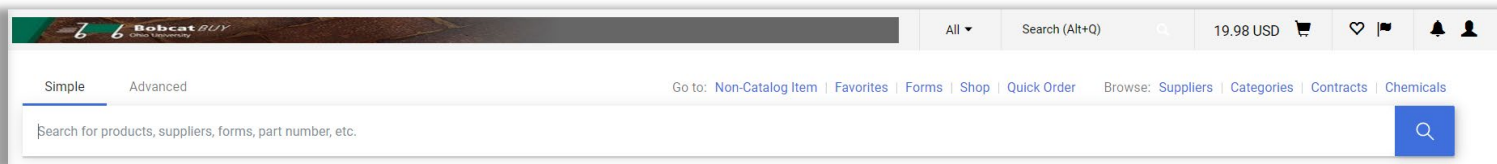
New Search Experience - Simple Search

The biggest visual change on the home page is the new simple search experience. The functionality remains the same, however the placement of the buttons has been moved.

Current UI



New UI



UI Updates:

1. The Shop dropdown category search has been changed and the Shop dropdown has been removed.
2. There are now two tabs above the search text field: Simple and Advanced. The advanced search link has been removed.
3. The Go to links and Browse links have been moved above the search bar and a new Shop link has been added to the Go to links.

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New Search Experience – Advanced Search

The only changes here are cosmetic. The Advanced search link is now a tab since the link was removed from the menu.

Current UI

The current UI for the Advanced Search page features a header with "Advanced Search" and a dropdown menu set to "Everything". A "simple search" link is located in the top right. Below this, the "Find Results That Have:" section contains three input fields: "All of These Words" (empty), "Part Number (SKU)" (empty), and "Commodity Code" (containing "Code, Description" with a search icon). To the right are "Supplier" and "Manufacturer Name" input fields. The "Other Options" section includes "Exact Phrase" (empty), "Any of These Words" (empty), and "Exclude Words" (empty). A blue "Search" button is positioned below the "Any of These Words" field. A checkbox labeled "Hide Advanced Search on search results" is in the bottom right. At the bottom, a navigation bar lists links: "Go to: simple search | favorites | forms | non-catalog item | quick order" and "Browse: suppliers | categories | contracts | chemicals".

New UI

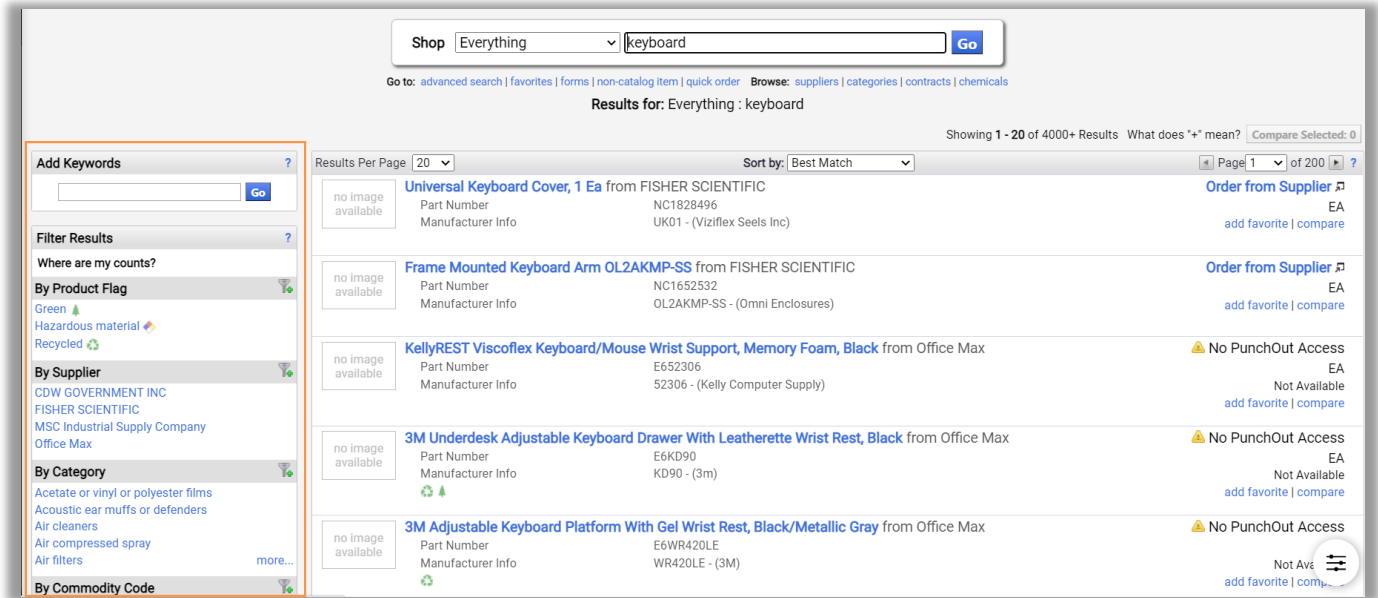
The new UI for the Advanced Search page features a header with "Simple" and "Advanced" tabs, with "Advanced" highlighted. A navigation bar at the top right lists links: "Go to: Non-Catalog Item | Favorites | Forms | Shop | Quick Order" and "Browse: Suppliers | Categories | Contracts | Chemicals". Below this, the "Advanced Search" dropdown is set to "Everything". The "Find Results That Have:" section includes "All of These Words" (containing a vertical bar), "Part Number (SKU)" (empty), and "Commodity Code" (empty with a search icon). To the right are "Supplier" and "Manufacturer Name" input fields. The "Other Options" section includes "Exact Phrase" (empty), "Any of These Words" (empty), and "Exclude Words" (empty). A blue "Search" button and a grey "Reset" button are located at the bottom right. Information icons are present on the right side of the "Find Results That Have:" and "Other Options" sections.

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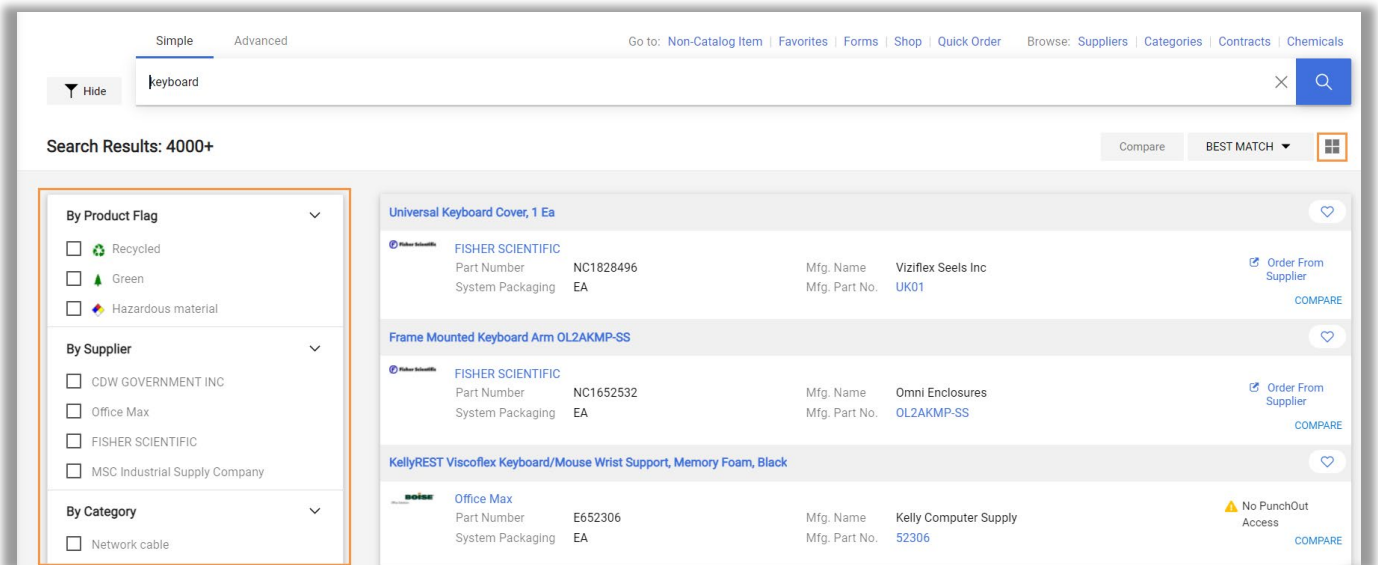
Search Results

Returned search results will look very similar to the current version. The only change is in the look and feel of the filters on the left side of the screen.

Current UI



New UI



Note: If you would like to see this list in a grid view, click the four boxes next to the Best Match drop down. Click again to return to a list view.

Non-Catalog Items

The add Non-Catalog Item fields have had some fields renamed.

Current UI

The screenshot shows a web form titled "Non-Catalog Item" with a search bar for "Enter Supplier" and a "Supplier Search" link. Below is a table with columns for Description, Catalog No., Quantity, Price, and UOM. The Description field has a character count of 254. A "Product Details" section contains a "Commodity Code" field and a list of checkboxes for various material types: Controlled substance, Recycled, Hazardous material, Radioactive, Radiation Generating Equipment, Select Agent, Toxin, Energy Star, and Green. At the bottom are buttons for "Save and Close", "Save and Add Another", and "Close".

Description	Catalog No.	Quantity	Price	UOM
<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

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

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

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New UI

Add Non-Catalog Item

Existing Supplier

Select Supplier

Item

Description *	Catalog No. *	Quantity *	Price *	UOM
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

254 characters remaining

Additional Details

Commodity Code

Product Flags

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

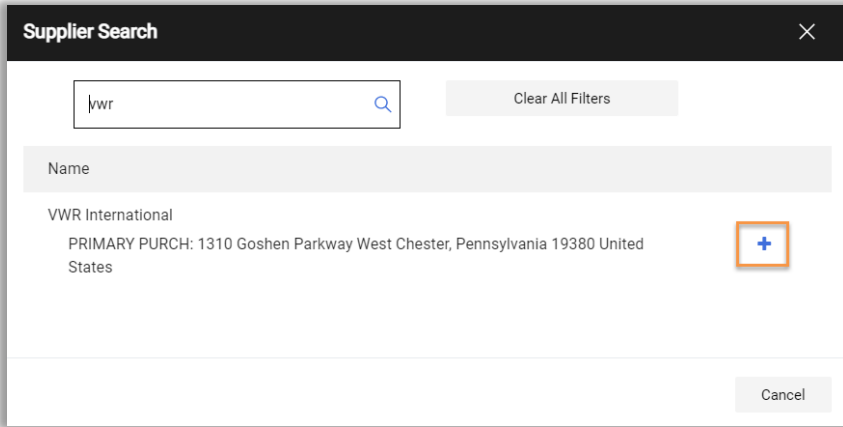
★ Required fields ⚙ Preferred

Save Save And Add Another Close

- Enter Supplier has been renamed to Existing Supplier.
- Brief description of service has been renamed to Description.
- Price estimate has been renamed to Price.
- Product details has been renamed to Additional details.

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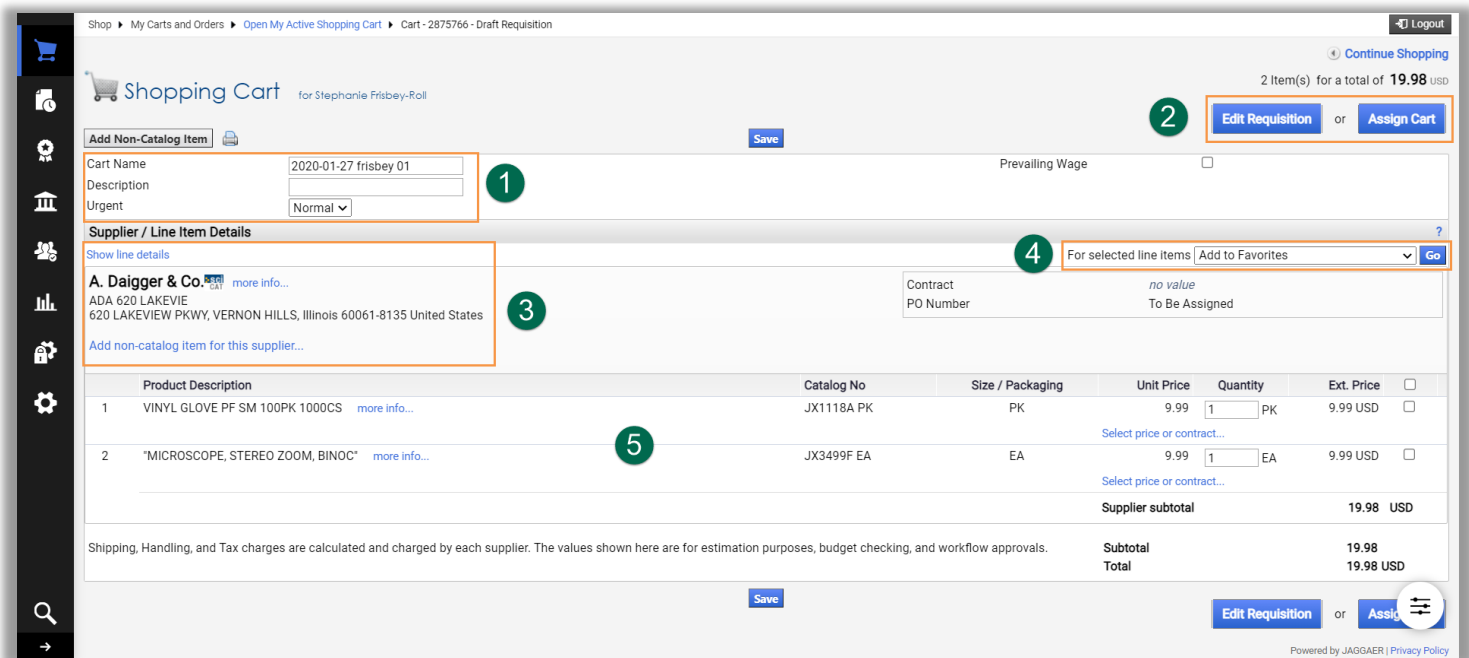
If you are entering an existing supplier, the look and feel of the fulfillment center has changed. Click the + to add the supplier.



Cart

The Shopping cart has changed; the biggest change is in the page layout. The screens have moved from a tabbed format to a scrolling format.

Current UI



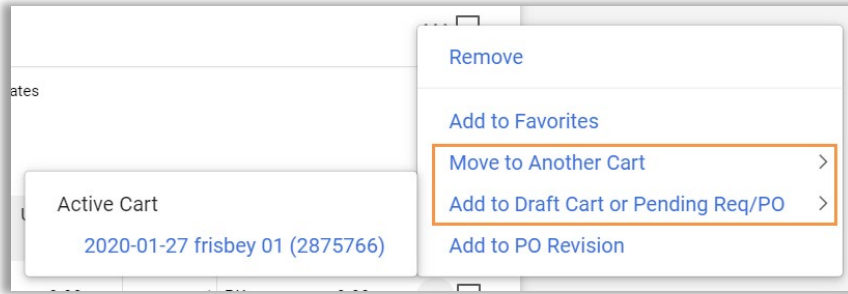
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New UI

The screenshot displays the 'Shopping Cart' interface for requisition 2875766. At the top, there are buttons for 'Assign Cart' and 'Edit Requisition'. A search bar is located at the top left, and a 'Details' sidebar on the right shows the requisition name and an estimate of 19.98 USD. The main area lists two items from supplier 'A. Daigger & Co.'. Item 1 is 'VINYL GLOVE PF SM 100PK 1000CS' and Item 2 is '*MICROSCOPE, STEREO ZOOM, BINOC*'. Both items have a commodity code of 529. Annotations 1 through 6 highlight specific UI changes: 1. Search bar; 2. Assign Cart and Edit Requisition buttons; 3. Supplier dropdown; 4. Actions dropdown; 5. Commodity Code field; 6. Item Details section.

1. The Search box from the Home page is now available in the cart.
2. The Edit Requisition and Assign Cart buttons now display at the top right corner.
3. Supplier Options have been added as a dropdown and links have been removed.
4. Actions drop down "For selected line items" name has been removed and replaced with a drop down arrow, which is only enabled when the items are selected. Note: You also have sub-menus available to Move to Another Car and Add to Draft Cart of Pending Req/PO to add items.

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5. Commodity Code has been added as a new field.
6. Item details can be collapsed by clicking on the drop down arrow.

Requisitions

Most of the changes are in the Requisition portion of the purchase in BobcatBUY. The screens are broken down into 3 sections to make it easier to view. Scroll to see the various changes made to the Requisition screen.

Requisitions Current UI (Part 1)

1. Submit Requisition / Assign Cart button

2. Alert box: Almost ready to go! The list below needs to be addressed before the request can be submitted. Required field: Accounting Date

3. Requisition Summary tabs

4. General tab details (Prepared by, HR_Person_ID, etc.)

5. Shipping tab details (Ship To, Delivery Options)

6. Billing tab details (All Invoices Directed To, Billing Options)

7. Cost Center and Object Code section with 'Required field' indicators

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Requisitions New UI (Part 1)

The screenshot displays the BobcatBUY Requisition New UI for requisition 3291495. The interface is divided into several sections:

- Header:** Shows the Requisition Number (3291495) with a dropdown arrow, and buttons for 'Assign Cart', 'Validate With ERP And Place Order', and 'Submit Requisition'. A callout '3' points to the Requisition Number dropdown.
- Navigation:** Tabs for 'Summary', 'PO Preview', 'Comments', 'Attachments', and 'History' are visible. A callout '4' points to the 'Summary' tab.
- General Section:** Contains fields for Cart Name, Description, Urgent status, Prepared by, Prepared for, HR_Person_ID, Ad Hoc Approval, Buyerid, Original Requisition Name, and Original Requisition Requestor. A callout '5' points to the 'Urgent' field.
- Shipping Section:** Includes 'Ship To' information (Attn, Ohio University, Dept, FI/Rm/Ste, West Union St Office Ctr, 160 West Union St, Athens, OH 45701, United States) and 'Delivery Options' (Expedite, Ship Via, Requested Delivery Date). A callout '6' points to the 'Ship To' address.
- Billing Section:** Shows 'All Invoices Directed To' (Accounts Payables, WUSOC, Room 210, 1 Ohio University, Athens, Ohio 45701-2979, United States) and 'Billing Options' (Requisition Date, Pay Alone). A callout '7' points to the 'Billing Options' section.
- Cost Center Section:** A table with columns for Account Type, Entity Source, Entity / Project, Source / Task, Organization / Task Org, Activity/Award, Function, and % of Price. A callout '7' points to the 'Cost Center' section.
- Draft Status Panel:** On the right, a 'Draft' status panel shows a 'Correct these issues' message with a red 'x' icon. It lists two required actions: 'Required: Does this cart include the purchase of technology (Software, cloud storage)?' and 'Required: Does this purchase require A&E purchasing Exception?'. A callout '1' points to the 'Draft' status.
- Total and Subtotal:** A summary box shows 'Total (19.98 USD)' and 'Subtotal 19.98'. A callout '2' points to the 'Total' amount.
- Next Steps:** A 'What's next for my order?' section shows the next step as 'Wait for Validation' with an approver 'Amuda, Deep Sagar'. A callout '6' points to the 'Next Step'.

1. The tabs for the requisition have been removed. A drop down has been added to the Requisition Number. The Return to Cart, Copy to New Cart, and Continue Shopping links were removed and added to the Requisition drop down.

The dropdown menu for the Requisition Number (3291495) contains the following options:

- Return to Cart
- Copy to New Cart
- Add Comment
- Continue Shopping
- View Carts
- View Cart return message(s)
- See configuration for this requisition

An additional button called Validate with ERP and Place Order has been added. Review the Realtime ERP Validation QRG for more details.

2. The Exceptions section has been moved and renamed to Correct These Issues. When you click on the link Required: Does this purchase require A&E purchasing exception, a new window will open displaying

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the A&E information. You can also scroll down through the requisition to find the missing required fields. The functionality remains the same as in current UI.

New UI

Edit Compliance Questions

Compliance Questions

Does this purchase require A&E purchasing Exception? * Required

Exception Requested by?

Exception Reason

A&E Justification

A&E Justification

★ Required fields Save Changes Close

- The old Summary page is now called the Requisition page. A new PO Preview tab has been added which displays the line-item information.

Summary **PO Preview** Comments Attachments History

Preview PO 1 PO Number To Be Assigned

A. Daigger & Co. · 2 Items · 19.98 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 VINYL GLOVE PF SM 100PK 1000CS	JX1118A PK	PK	9.99	1 PK	9.99
2 *MICROSCOPE, STEREO ZOOM, BINOC*	JX3499F EA	EA	9.99	1 EA	9.99

- The ellipsis next to each section gives the user the opportunity to Show Optional Fields or Hide Optional Fields. Click the pencil icon to edit details. This is a one-time only action when you choose to hide optional fields, the default is set to show all fields.

Requisition • 2875766

Summary **PO Preview** Comments Attachments History

General Shipping

Cart Name 2020-01-27 Irisbey 01

Description no value

Hide optional fields

Help

Ohio University

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Hide Optional Fields

A screenshot of a 'General' form where all optional fields are hidden, leaving only the title and a few icons visible at the top.

Show Optional Fields

A screenshot of a 'General' form with various optional fields displayed. The fields and their values are:

Cart Name	2020-01-27 frisbey 01
Description	no value
Urgent	Normal
Prepared by	Stephanie Frisbey-Roll
Prepared for	Stephanie Frisbey-Roll
HR_Person_ID	no value
Ad Hoc Approval (Req)	no value
BuyerId	no value
Original Requisition Name	no value

5. The Shipping section can be added or updated by clicking the pencil icon.

The 'Edit Shipping' dialog box is shown with the 'CURRENT ADDRESS' section selected. The address details are as follows:

Attn: *	Stephanie Frisbey-Roll	<input type="checkbox"/> Add to my addresses
Contact Line 2	Ohio University	
Dept:		
Fl/Rm/Ste: *	2	
Address Line 1	West Union St Office Ctr	
Address Line 2	160 West Union St	
City	Athens	
State	OH	
Zip Code	45701	
Country	United States	

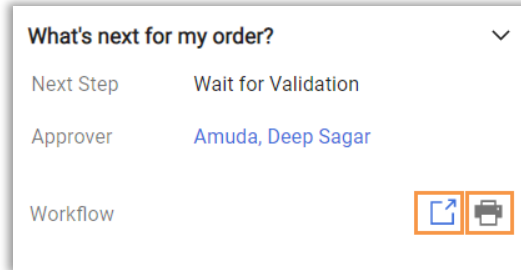
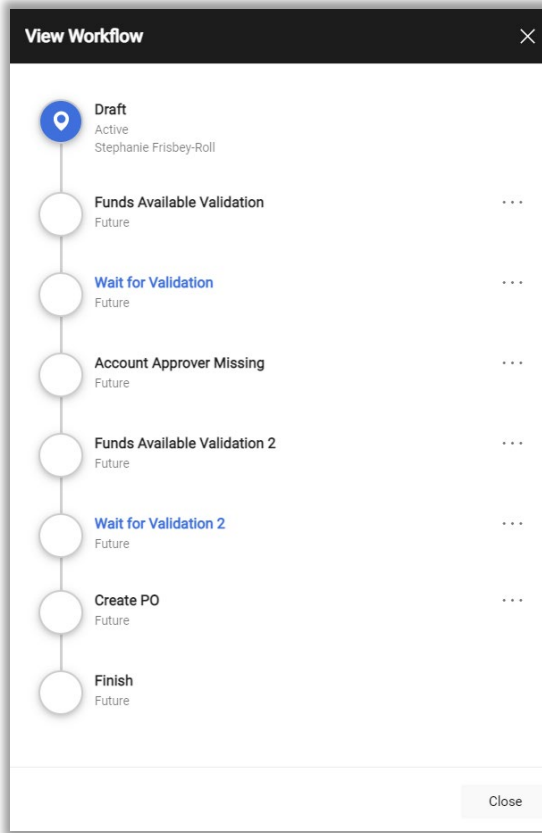
Annotations:

- A green arrow points to the address details with the text: "The current address is listed here. This section is not displayed if the shipping address is not available."
- Another green arrow points to the search box with the text: "Use the search box to search for addresses. The results will be listed above the search box for your selection."

At the bottom, there is a search box labeled "Search additional" with a magnifying glass icon, a "Results Per Page" dropdown set to "10", and buttons for "Save Changes" and "Close". A legend indicates that fields with a star are required.

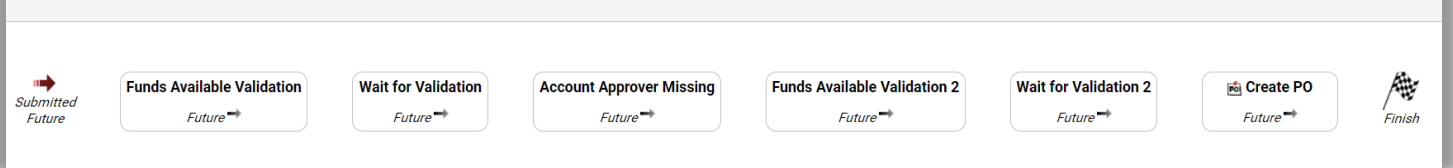
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- What's next for my order? Click this dropdown to view the approval workflow. The View Approvers tab has been renamed to What's Next for my order? The current workflow step is highlighted with the green arrow pointing towards the workflow step.



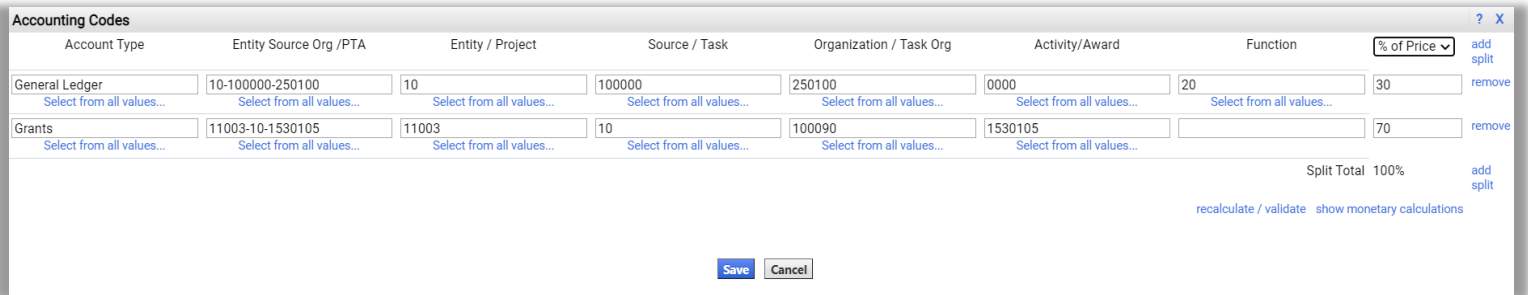
Click the Printer icon in the workflow section to see the approvals in the current format. Click the open in a new window icon to see the full list of approvals for this order.

Approvals - 3291495 - Draft Requisition



- Cost Center and Object Code Sections can be updated by clicking the pencil icon.

Current UI



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New UI

Edit Cost Center

Accounting Codes

Account Type *	Entity Source Org / PTA *	Entity / Project *	Source / Task *	Organization / Task Org *	Activity/Award *	Function
General Ledger	10-100000-250100	10	100000	250100	0000	20
	003-10-1530105	11003	10	100090	1530105	

Organization Values
General Ledger - General Ledger
Grants - Grants

Make sure your cursor is in the Accounting Codes section. If your cursor is elsewhere on the screen, you won't see all the options available.

Save Changes Close

- Click the + button to add a split.
- Click the diagonal arrow in the Account Type field to select GL or Grants account type.
- Click the magnifying glass to open a search box.

Custom Field Search

Value Description Filter

Clear All Filters

Page 1 of 200 1-20 of 4000 Results 20 Per Page

Value	Description
10-000000-000000	GENERAL BALANCE SHEET SOURCE BALANCE SHEET ORGANIZATION
10-000000-100200	GENERAL BALANCE SHEET SOURCE MATH
10-000000-329020	GENERAL BALANCE SHEET SOURCE CH FACILITIES MANAGEMENT
10-000000-500050	GENERAL BALANCE SHEET SOURCE OU PRESS
10-000000-520010	GENERAL BALANCE SHEET SOURCE LIBRARY OPERATIONS
10-000000-809999	NOT YET MAPPED VPFA
10-000000-830000	GENFRAI BAL ANCE SHEET SOURCE DIVISION OF

Cancel

- Type a full or partial cost center to start searching.
- Click on the Filter button to search or press the enter key on your keyboard.
- Click the + button to add the account.

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The screenshot shows the 'Edit Cost Center' window with a table of Accounting Codes. The table has columns for Source Org / PTA, Entity / Project, Source / Task, Organization / Task Org, Activity/Award, Function, and a dropdown for split options. The dropdown is currently set to '% of Price'. A green arrow points to the right side of the table with the text 'Be sure to scroll to the right to see the split options'. The table shows two rows of data with their respective split percentages and USD values. A 'Save Changes' button is highlighted in the bottom right corner.

Source Org / PTA	Entity / Project	Source / Task	Organization / Task Org	Activity/Award	Function	Split Options	Value
00000-250100	10	100000	250100	0000	20	% of Price	30 (5.99 USD)
03-10-1530105	11003	10	100090	1530105		% of Price	70 (13.99 USD)

Split Total 100% (19.98 USD)

★ Required fields

Save Changes Close

- Be sure to scroll to the right to see all the options available.
- Select the type of split you would like to apply, % of Price or % of Quantity from the drop down.
- After entering the split, click on the check mark to calculate the split amount.

8. A new button called Filter View has been added with the options below:

The screenshot shows a dropdown menu for 'Filter View'. The menu is open, showing various options for filtering the data. The 'View All' option is selected. The menu items are: View All, View Line Items Only, View General Only, View Shipping Only, View Billing Only, View Cost Center Only, View Object Code Only, View Internal Notes and Attachments Only, View IT Questions Only, View Compliance Questions Only, and View External Notes and Attachments Only.

Filter View Options:

- View All
- View Line Items Only
- View General Only
- View Shipping Only
- View Billing Only
- View Cost Center Only
- View Object Code Only
- View Internal Notes and Attachments Only
- View IT Questions Only
- View Compliance Questions Only
- View External Notes and Attachments Only

Each option allows the user to isolate specific information to review and/or edit.

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Requisitions Current UI (Part 2)

Internal Notes and Attachments ?

Internal Note *no note* [edit](#)

Internal Attachments

[Add Attachments](#)

IT Questions ?

Does this cart include the purchase of technology (Software, cloud storage)? *no value* [Required field](#) [edit](#)

Will this Purchase store any sensitive information? *no value*

Will this purchase store data offsite (cloud service)? *no value*

Will this service be used by more than 50 students or members of the public? *no value*

Compliance Questions ?

Does this purchase require A&E Purchasing Exception? *no value* [Required field](#) [edit](#)

Exception requested by? *no value*

Exception Reason *no value*

A&E Justification *no value*

A&E Justification *no value*

External Notes and Attachments ?

Note to all Suppliers *no note* [edit](#)

Attachments for all suppliers

[Add Attachments](#)

Supplier / Line Item Details ?

For selected line items [Add to Favorites](#) [Go](#)

BROWN ENTERPRISE SOLUTIONS LLC [more info...](#)

[Add non-catalog item for this supplier...](#)

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 7/7/2021 1:29:57 PM

Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Hammermill Copy Plus 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream, 3 Reams/Carton (105040) more info...	24422900	CT	19.69	3 CT	59.07 USD	<input type="checkbox"/> edit

Manufacturer Name: INTERNATIONAL PAPER

Manufacturer Part Number: 105040

Supplier Part Auxiliary ID: [more info...](#)

Commodity Code: 536

Print Services

Internal Note: *no note*

Internal Attachments

[Add Attachments](#)

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Requisitions New UI (Part 2)

Internal N...	IT Questions	Compliance Questions	External N...
Internal Note <i>no value</i>	Does this cart include the purchase of technology (Software, cloud storage)? <i>no value</i> Required	Does this purchase require A&E purchasing Exception? <i>no value</i> Required	Note to all Suppliers <i>no value</i>
Internal Attachments Add		Exception Requested by? <i>no value</i>	Attachments for all suppliers Add
DEA Exp. Date <i>no value</i>	Will this Purchase store any sensitive information? <i>no value</i>	Exception Reason <i>no value</i>	Send to Bid <i>no value</i>
Event Title <i>no value</i>		A&E Justification <i>no value</i>	
Event Name <i>no value</i>	Will this purchase store data offsite (cloud service)? <i>no value</i>	A&E Justification <i>no value</i>	
Event Close Date <i>no value</i>	Will this service be used by more than 50 students or members of the public? <i>no value</i>		
Event Issue Date <i>no value</i>			

2 Items ☐ ▾

A. Daigger & Co. · 2 Items · 19.98 USD ⋮ ☐

^ SUPPLIER DETAILS ADA 620 LAKEVIE : 620 LAKEVIEW PKWY, VERNON HILLS, Illinois 60061-8135 United States

Contract *no value* PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 VINYL GLOVE PF SM 100PK 1000CS	JX1118A PK	PK	9.99	<input type="text" value="1"/> PK	9.99	⋮ ☐

^ ITEM DETAILS

UNSPSC	46-18-15-04	Contract:	<i>no value</i>	Internal Note	<i>no value</i>
more info...	Commodity Code	529 / Laboratory/Medical Equipment & Supplies		Internal Attachments	Add
				External Note	<i>no value</i>
				Attachments for supplier	Add

- In the new UI the Supplier/Line Item details such as the Manufacturer Name, CAS Number, and Supplier details have been added from the More info... link in the current UI. The item details can be expanded and collapsed by clicking the arrow to the left of the item in the new UI.

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- Line Level actions available:

Override

- Ship To
- Delivery Options
- All Invoices Directed To:
- Credit Card Info
- Accounting Codes
- Object Code

Remove

- Add to Favorites
- Move to Another Cart >
- Add to Draft Cart or Pending Req/PO >
- Add to PO Revision

Line Level account distribution split options are found here

Use the same steps outlined in the Cost Center and Object Code section above to apply line item splits to your order.

- Click the drop down arrow to see the line item options available.

2 Items

A. Daigger & Co. · 2 Items · 19.98 USD

SUPPLIER DETAILS ADA 620 LAKEVIE : 620 LAKEVIEW PKWY, VERNON HILLS, Illinois 60061-8135 United States

Contract no value PO Number To Be Assigned


Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 VINYL GLOVE PF SM 100PK 1000CS	JX1118A PK	PK	9.99	1 PK	9.99

Drop down menu is only available when a check is in the line item box

- Add to Favorites
- Remove Selected Items
- Remove All Items
- Move to Another Cart >
- Add to Draft Cart or Pending Req/PO >
- Add to PO Revision
- Change Commodity Code

Requisition Submission

Requisition Submission Confirmation Current UI

 **Requisition Submitted**

Next Steps
You can view or print this at: [Requisition 3289966](#), or via the [Search Requisitions](#) page


- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)


Requisition Summary

Requisition number	3289966 Quick View
Requisition status	Pending
Cart name	2021-07-07 frisbey 01
Requisition date	7/7/2021
Requisition total	19.98 USD
Number of line items	2

Requisition Submission Confirmation Current UI

Simple Advanced ...

Search for products, suppliers, forms, part number, etc. 

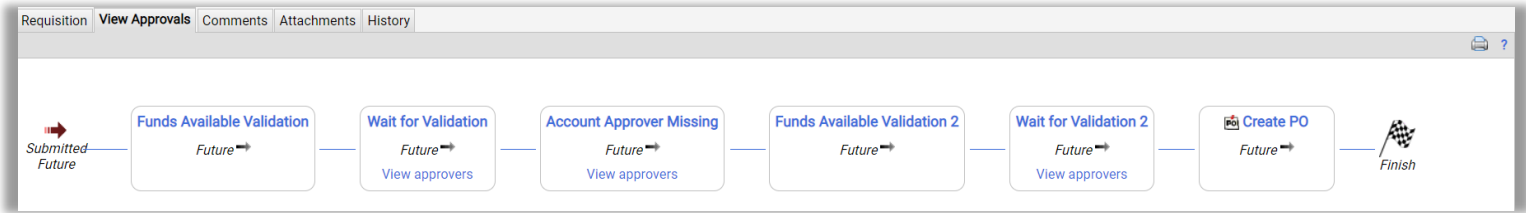
 **Requisition 2875766 Submitted**

Summary	Options
Requisition number 2875766	Print
Requisition status Pending	Recent orders
Cart name 2020-01-27 frisbey 01	Return to your home page
Requisition date 7/7/2021	
Requisition total 19.98 USD	
Number of line items 2	

- In the new UI the Search field has been added to the top of the Requisition Confirmation screen.
- The Next Steps section has been removed. A new section called Options has been added. This section includes links to Print, Recent orders, and Return to home page.

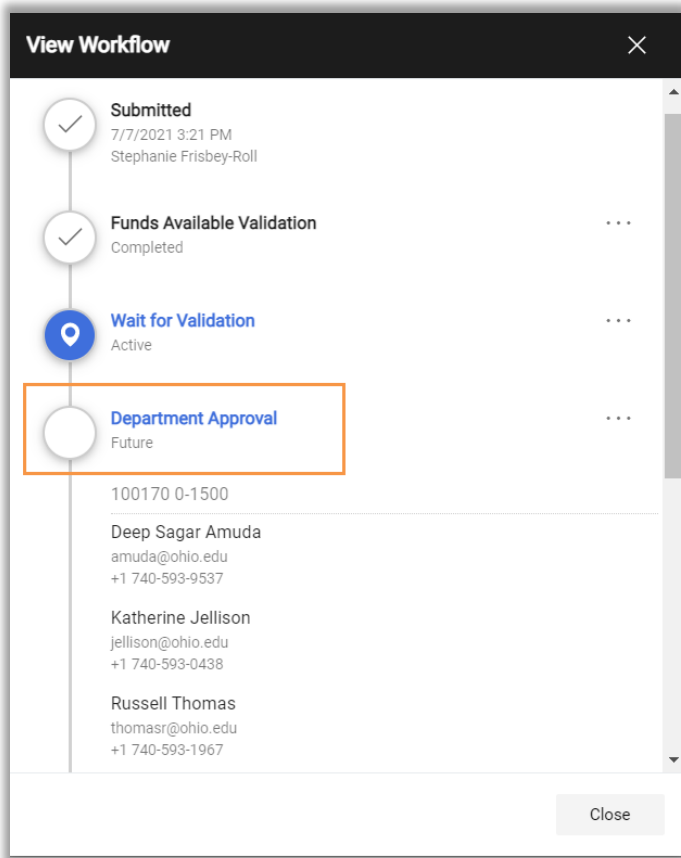
BobcatBUY User Interface Upgrade 21.2

View Workflow



Workflow for Submitted Requisitions Current UI

Workflow for Submitted Requisitions New UI



The biggest change is that the workflow has changed from a horizontal view to a vertical view. This is embedded into the Requisition Summary page.

The Approvals tab has been removed. Click the Departmental Approval step to see all the approvers in the workflow step.

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Assign and Approve the Requisition

Assign and Approve the Requisition Current UI

Available Actions: Assign to myself

General	Shipping	Billing
Status: Pending Department Approval	Ship To: Attn: Michael Pidcock, Ohio University	All Invoices Directed To: Accounts Payables, WUSOC, Room 210
Submitted: 7/7/2021 3:01 PM	Dept: FI/Rm/Ste: 29 Park Place, Athens, Ohio 45701	Billing Options: Requisition Date, Pay Alone
Cart Name: 2021-07-07 amuda 01	United States	
Description: create a requisition, PO - single item, multiple quantities, multiple distributions (1 GL account & 1 PA account chosen from "Grants Project & Task Test Accounts.docx" split by % of price) - Test for Grants approval workflow step (OC - 718710) and a	Delivery Options: Expedite	

Assign and Approve the Requisition New UI

Requisition: 3289994

General	Shipping	Billing
Status: Pending Department Approval	Ship To: Attn: Michael Pidcock, Ohio University	All Invoices Directed To: Accounts Payables, WUSOC, Room 210
Submitted: 7/7/2021 3:01 PM	Dept: FI/Rm/Ste: 29 Park Place, Athens, Ohio 45701	United States
Cart Name: 2021-07-07 amuda 01	United States	Billing Options
Description: create a requisition, PO - single item, multiple quantities, multiple distributions (1 GL account & 1 PA account chosen from "Grants Project & Task Test Accounts.docx" split by % of price) - Test for Grants approval workflow step (OC - 718710) and a		

Pending Summary:

Total (49,000.00 USD)	
Subtotal	49,000.00
	49,000.00

What's next? Workflow

- In the new UI the Assign to myself action from the drop down has been changed to a Claim button.

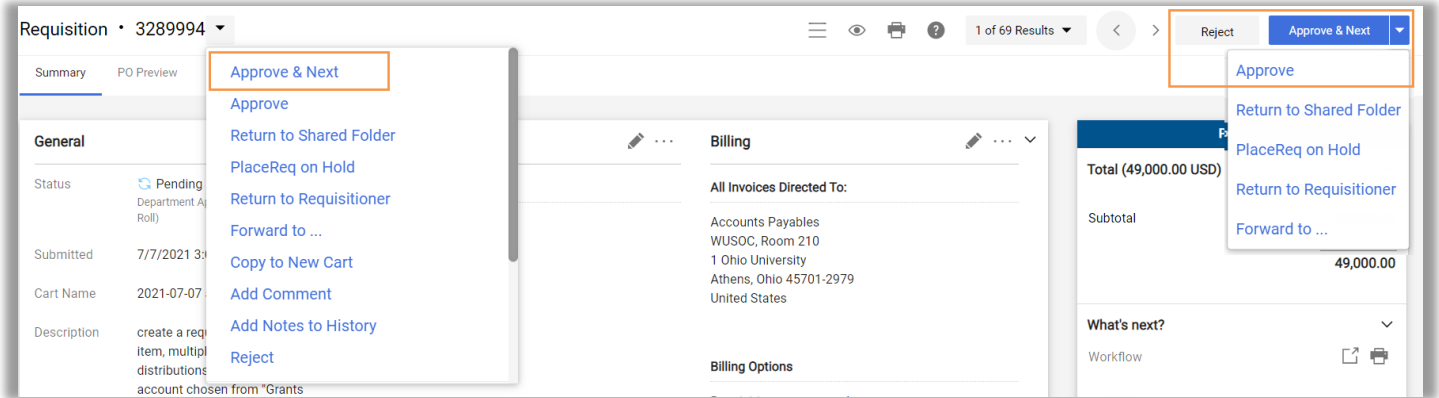
Current UI

Available Actions:

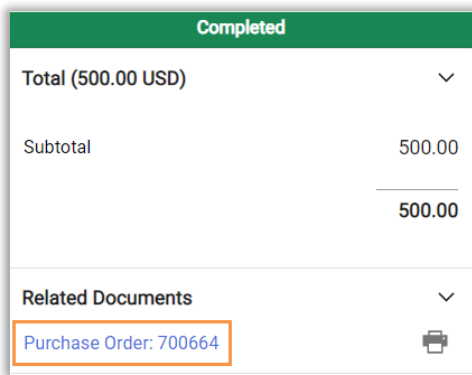
- Approve/Complete & Show Next
- Approve/Complete Step
- Return to Shared Folder
- PlaceReq on Hold
- Return to Requisitioner
- Forward to ...
- Copy to New Cart
- Add Comment
- Add Notes to History
- Reject Requisition

BobcatBUY User Interface Upgrade 21.2

New UI



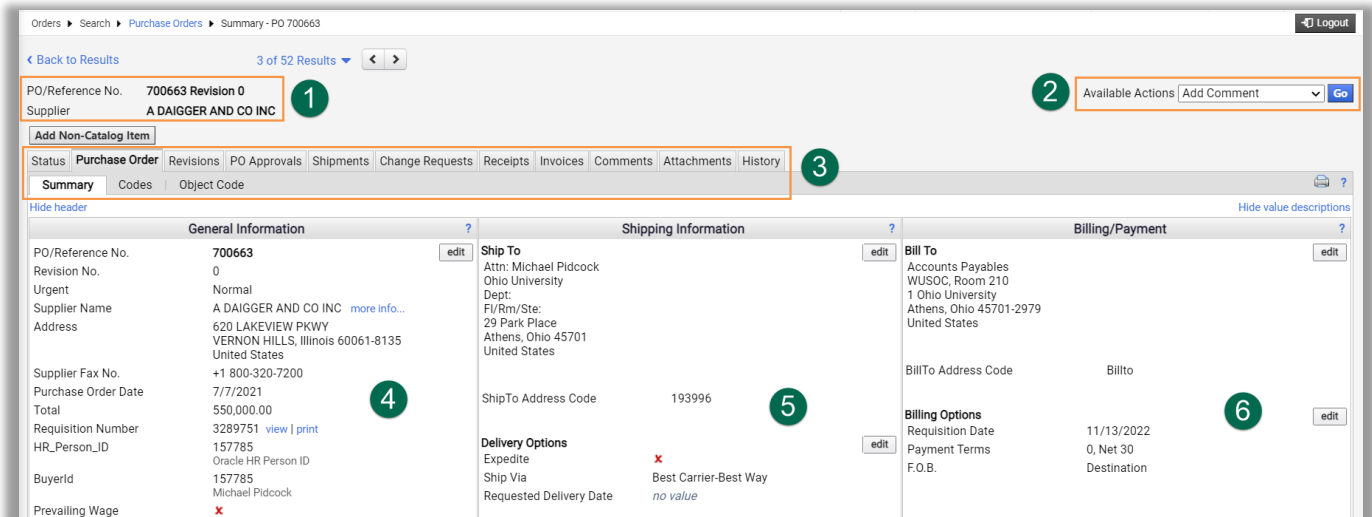
- In the new UI Requisitions can be approved by clicking one of the Approve and Next options from either the Approve and Next button at the top right or the Requisition number drop down menu.
- Once the Requisition is approved, the PO Number can be found in the Related Documents section.



Purchase Orders

You will see the same look and feel applied to the PO section just like in the Requisitions section. Functionality has not changed.

Current UI (Part 1)



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New UI (Part 1)

The screenshot displays the 'Purchase Order' summary page for PO 700663 Revision 0. The interface is organized into several sections:

- Header:** 'Purchase Order • 700663 Revision 0' with a dropdown arrow and a search icon.
- Navigation:** A horizontal menu with tabs: Status, Summary (active), Revisions (1), Confirmations, Shipments, Change Requests, Receipts, Invoices (1), Comments, Attachments, and History.
- General Information (4):** PO/Reference No. 700663, Revision No. 0, Urgent Normal, Supplier Name A DAIGGER AND CO INC (1), Address 620 LAKEVIEW PKWY, VERNON HILLS, Illinois 60061-8135, Supplier Fax No. +1 800-320-7200, Purchase Order Date 7/7/2021, Total 550,000.00, Requisition Number 3289751, HR_Person_ID 157785.
- Shipping Information (5):** Ship To: Attn: Michael Pidcock, Ohio University, Dept: FI/Rm/Ste: 29 Park Place, Athens, Ohio 45701, United States. ShipTo Address 193996, Code.
- Billing/Payment (6):** Bill To: Accounts Payables, WUSOC, Room 210, 1 Ohio University, Athens, Ohio 45701-2979, United States. Billing Options: Requisition Date 11/13/2022, Payment Terms 0, Net 30, F.O.B. Destination.
- Summary:** Total (550,000.00 USD), Subtotal 550,000.00.
- Related Documents (7):** Requisitions: 3289751, Invoices: T0000695.
- What's next?:** Workflow Status Completed.

1. The Supplier name has been moved from the top of the PO summary page.
2. The Available Actions drop down has been move to the Purchase Order number drop down. Options were not changed.

- Add Comment
- Add Notes to History
- Cancel PO
- Finalize Revision
- Create Quantity Receipt
- Create Cost Receipt
- Print Fax Version
- Send Test PO
- Soft Close PO
- Close PO

3. The approvals tab has been removed and added to the What's Next section on the right side of the screen.
4. The General Information section has been changed to look like that section on the Requisition page.
5. The Sipping Information section has been changed to look like that section on the Requisition page.
6. The Billing Information section has been changed to look like that section on the Requisition page.
7. Documents related to the PO, like the Requisition or Invoice are available in the Related Documents sections. The What's Next section show the PO Approval workflow just like in the Requisition workflow.

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Current UI (Part 2)

Orders > Search > Purchase Orders > Summary - PO 700663 Logout

Distribution Information		Compliance Questions		Supplier Information	
Distribution Methods This does not create a purchase order that will be sent to the supplier. Fax: +1 800-320-7200 Email (HTML Attachment): procurement@ohio.edu		Compliance Questions Does this purchase require A&E purchasing Exception? NO Exception Requested by? no value Exception Reason no value A&E Justification no value A&E Justification no value		Supplier Information Contract: no value Note to Supplier: no note Attachments for supplier: Add Attachments Non Preferred Vendor: no value	
Distribution Options Supplier Terms and Conditions: no value add... Order acceptance instructions: This Purchase Order is subject to Ohio University's standard Terms and Conditions which are inc... more...					

Codes							Object Code
Account Type	Entity Source Org /PTA	Entity / Project	Source / Task	Organization / Task Org	Activity/Award	Function	Object Code
General Ledger	10-100000-100170	10	100000	100170	0000	20	725030
General Ledger	GENERAL\UNRESTRICTED\HISTORY	GENERAL	UNRESTRICTED	HISTORY	UNSPECIFIED	UNIVERSITY RESEARCH	PROFESSIONAL SERVICES

[View/edit by line item...](#)

Line Item Details

[Hide line details](#) For selected line items [Cancel Selected PO Lines](#) [Go](#)

[Add non-catalog item...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 <input checked="" type="checkbox"/> create PO - multiple items, single distribution, req total >\$500K and ad hoc approval to risk management, change accounting date to FUTURE OPEN period - HEADER LEVEL(VPFA Review - req total >\$500K; Req Ad Hoc Approval - Risk Management) more info...	N/A	EA	5,500.00	100 EA	550,000.00 USD	<input type="checkbox"/> edit
Taxable <input checked="" type="checkbox"/> Commodity Code: 529 Laboratory/Medical Equipment & Supplies		Requisition Number: 3289751 view print External Note: no note Attachments for supplier: Add Attachments				

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals. **Total** 550,000.00 US\$

BobcatBUY User Interface Upgrade 21.2

New UI (Part 2)

Distribution Information

Distribution Methods

This does not create a purchase order that will be sent to the supplier.

Fax: +1 800-320-7200

Email (HTML Attachment): procurement@ohio.edu

Distribution Options

Supplier Terms and Conditions: no value, add...

Order: This Purchase Order is subject to

Compliance Questions

Does this purchase require A&E purchasing Exception? NO

Exception Requested by? no value

Exception Reason: no value

A&E Justification: no value

Supplier Information

Contract: no value

Note to Supplier: no value

Attachments for supplier: Add

Non Preferred Vendor: no value

Codes

Account Type	Entity Source Org / PTA	Entity / Project	Source / Task	Organization / Task Org	Activity/Award	Function	Object Code
General Ledger	10-100000-100170	10	100000	100170	0000	20	725030
General Ledger	GENERAL UNRESTRICTED HISTORY	GENERAL	UNRESTRICTED	HISTORY	UNSPECIFIED	UNIVERSITY RESEARCH	PROFESSIONAL SERVICES

1 Item

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	Actions
1	✓ create PO - multiple items, single distribution, req total >\$500K and ad hoc approval to risk...	N/A	EA	5,500.00	Qty: 100 EA	550,000.00	...

ITEM DETAILS

Contract: no value | Requisition Number: 3289751 | External Note: no value | Attachments for supplier: Add

Taxable: ✓

Commodity Code: 529 / Laboratory/Medical Equipment & Supplies

Completed

Details

Supplier Status: Sent To Supplier

Supplier: A DAIGGER AND CO INC

Total (550,000.00 USD)

Subtotal: 550,000.00

Workflow Status: Completed

- The Actions drop down is now only available as a drop down when an item is selected with a check mark in the box. This is displayed like the Requisition actions.

BobcatBUY User Interface Upgrade 21.2

Invoice Page

The UI on the Invoice page has been changed to have the same look and feel as the Requisition and PO pages.

Current UI

1 Voucher Number: T0000695
Supplier Invoice No.: EZE TEST 25 21.2
Supplier Name: A DAIGGER AND CO INC

2 Buyer Invoice | Approvals | Matching | Comments | Attachments | History

3 Available Actions | Mark as In Process | Go

4 Invoice Date: 7/7/2021

5 Remit To: 37120 EAGLE WAY, CHICAGO, Illinois 60678-1371

6 Note/Attachments: EZE TEST 25 21.2 upgrade

7 Payment Information: Accounting Date: 7/7/2021

8 Discount, Tax, Shipping & Handling: Discount, tax, shipping & handling

New UI

1 Invoice • T0000695

2 Summary | Matching | Comments | Attachments | History

3 Complete

4 Voucher Number: T0000695

5 Remit To: 37120 EAGLE WAY, CHICAGO, Illinois 60678-1371

6 Note/Attachments: EZE TEST 25 21.2 upgrade

7 Payment Information: Accounting Date: 7/7/2021

8 Discount, Tax, Shipping & Handling: Discount, tax, shipping & handling

Complete Summary:

A DAIGGER AND CO INC	
Supplier Invoice No.	EZE TEST 25 21.2
Total (550,000.00 USD)	
Subtotal	550,000.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
550,000.00	

Related Documents:

- Purchase Order: 700663
- Requisitions: 3289751

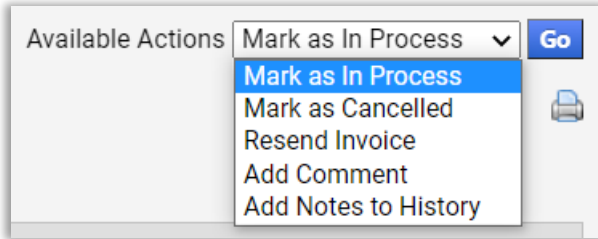
What's next:

Submitted
7/7/2021 2:06 PM
Wendy Jones

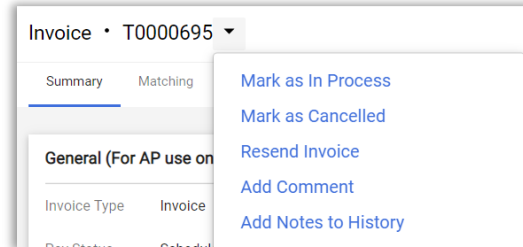
Bobcat *BUY* User Interface Upgrade 21.2

1. The Supplier Name has been removed from the top portion of the screen, displaying only the Voucher Number.
2. The Invoice Summary page has been consolidated to one page, removing all the subtabs from the current UI. All other tabs have been removed except for Matching, Comments, Attachments, and History.
3. The Available Actions drop down from the current UI has been removed and placed in the Invoice Number drop down.

Current UI



New UI



4. General (For AP use only) section – UI has been changed and all the fields remain the same.
5. Addresses section - UI has been changed and all the fields remain the same.
6. Note/Attachments - UI has been changed and all the fields remain the same.
7. Payment Information (AP Use only) - UI has been changed and all the fields remain the same.
8. Discount, Tax, Shipping & Handling – UI has been changed and all the fields remain the same.

Questions?

For questions contact Finance Customer Care at financecustomercare@ohio.edu.