Approval Permissions
In order to approve requisitions, you must have the appropriate approval permissions. Your Budget Unit Manager must notify Procure To Pay to let them know you have the role of Approver. Your Budget Unit Manager must also provide a list of account numbers for which you are authorized to approve. For additional information or to submit your request, your Budget Unit Manager may email: procurement@ohio.edu

Preferred Email Format
When a Shopper submits a request for approval, an email is automatically generated to the Shopper and Requester. Upon submission of the requisition by the Requester, an enhanced email notification containing order and line information is sent to the appropriate Approver for purchase requests ≥ $1500.

The new enhanced email may be delivered via HTML Format OR Plain Text. The default setting is HTML format; however, it can be overridden at the user level.

You may manage your own preferred email format.
1. Click on your Name (top right) > View My Profile.
2. Under User Information and Settings, click Language, Time Zone And Display Settings.
3. Under Preferred Email Format, select HTML or Plain Text.
4. Click Save.

For Approvers ONLY: Email Approvals
You have the ability to take action directly from your email. This will allow you greater flexibility in approving some requisitions, without having to login to BobcatBUY. This feature is accessible via laptop with internet access or from a mobile phone with email/data plan.

**WARNING:** If you have not yet configured your personal Email Approval Code in your profile, you cannot approve directly from an email. BobcatBUY requires an email approval code.

1. Click on your Name (top right) > View My Profile.
2. Under User Information and Settings, click User’s Name, Phone Number, Email, etc.
3. A personal Email Approval Code is required to ensure the authorized Approver is taking action.
4. In the Email Approval Code field at the bottom of the window, enter your personal approval code. The minimum value is four (4) characters. This is case sensitive.
5. Click Save.
6. Each time you would like to approve directly from email, you must enter your personal Email Approval Code. This is case sensitive.

After you specify your Email Approval Code, the field will display ten (10) dots, regardless of length of the approval code that you specified. Once your approval code is setup, you may review a Requisition’s Summary via email and select one of the following actions:

- Approve
- Assign To Myself
- Reject
- Return To Requisitioner
- Add Optional Comments
**For Approvers ONLY: Take Action Via Email**

Once your Email Approval Code is setup, you may review a Requisition’s Summary via email and Take Action without logging into BobcatBUY. The Take Action button directly accesses a secure webpage quick link.

**WARNING:** If the requisition contains more than ten (10) lines, you must login to BobcatBUY to review the details.

1. When you receive your Approval Email Message, scroll down and review the requisition Summary.

**WARNING:** Under Cost Center, if you see the following, “Accounting codes values vary by line.” It is highly recommended that you login to BobcatBUY and review the requisition, rather than approving via email.

2. In the email, click the Take Action button. If the Take Action link does not display, you do not have your Email Approval Code setup in your Profile.

**WARNING:** If you have not yet configured your personal Email Approval Code in your profile, you cannot approve directly from an email. BobcatBUY requires an email approval code.

3. The web page appears to process requisition. A new action screen appears.

4. Click the radio button next to the desired action: Approve, Assign To Myself, Reject, or Return To Requisitioner.

5. Add optional Comments.

6. Enter your personal Email Approval Code. If you enter an invalid approval code, re-enter the correct code. If you forget your approval code, you must login to BobcatBUY and setup a new code in your Profile.

7. Click Submit.

8. Click OK.

**NOTE:** If an action has already been taken on the requisition by another Approver, you will receive a warning indicating, *The document has already been acted upon.*

**WARNING:** If a requisition contains two Cost Centers (account numbers), a separate approval email message will be sent for each Cost Center. You must process each separate email for the Cost Center charged, before the requisition will move forward in the Approval Workflow.

**Action Items**

If the shopping cart was assigned to you from a Shopper, you must review, verify, and correct (or return the requisition to the Shopper for corrections) the purchase request. If the requisition is > $1500 it will automatically route to you based on the Cost Center (account number) for which you are responsible. Your task is to review and verify all requisitions assigned to you.

1. Click Action Items (top right).

There are two types of approvals that are displayed under your Action Items: Carts Assigned To Me and Requisitions To Approve. To the right of each option, a number is displayed. This number lets you know how many tasks you have to complete.

2. Click the Carts Assigned To Me link.

3. Under Drafts Assigned To Me, click the Shopping Cart Name. The shopping cart will open for your review. See “Carts Assigned To Me: Edit Requisition.”

4. Click the Requisitions To Approve link.

5. In the Group Results By drop-down list (top left), select Folder.

6. To view all of the requisitions, click the Expand All link. See “Assign A Requisition To Myself.”

**Carts Assigned To Me: Edit Requisition**

If the shopping cart was assigned to you from a Shopper, you must verify all the information contained in the requisition is correct. As a result, you must review, verify, and correct (or return the requisition to the Shopper for corrections) the purchase request. **REMARK:**: Carts under $1500 will be processed by the Requester unless the Requester specifically wants you to review it before it is submitted. In this case, the Requester will assign a cart directly to you. If the requisition is > $1500 it will automatically route to you based on the Cost Center (account number) for which you are responsible. Your task is to review and verify all requisitions assigned to you.

1. Click Action Items (top right).

2. Click the Carts Assigned To Me link.

3. Under Drafts Assigned To Me, click the Shopping Cart Name. The shopping cart will open for your review.

4. From within the assigned shopping cart, click the Edit Requisition button. The cart Summary will display. The Red Triangle/s at the top of the page indicate information is required prior to submission.

**NOTE:** Edit the information at the Header level for the majority of the items on the requisition. If anything is different at the Line level, you must edit the information at the Line level.

5. Review the items or services that are being requested for purchased.

6. Remove/Move items from the cart, if necessary.

7. Return The Cart, if necessary. Ask the Shopper to make specific revisions.

8. Click the Cost Center tab. Review the account number charged in the Header level. Review any account numbers charged at the Line level. You may Add A Split (account splits between cost centers), if necessary.

9. Click the Shipping tab. Review the address entered in the Header level. Review any addresses entered at the Line level.

10. Click the Billing tab (at the end of the fiscal year ONLY) to verify the expense is charged to the appropriate Fiscal Year.

11. Click the Natural Account tab. Review the natural account in the Header level. Review any natural accounts at the Line level.
The folder at the top of the screen is the **My Requisition Approvals** folder. If a shopping cart is assigned directly to you, it will appear in your folder. Otherwise it will display in the **Shared Folder** (this is a folder that you share with one or more **Approvers**). Requisitions must be moved from the **Shared Folder** into your **My Requisition Approvals** folder. When a requisition displays in your **My Requisition Approvals** folder, you are the only **Approver** who can take action for this particular requisition. Your name will also display in the **Shared Folder**, under the **Approver** column, so others will know that you are responsible for this requisition.

### Assign A Requisition To Myself

Upon submission of a requisition, an email will be sent to all **Approvers** on the **Cost Center** (account number). The **Shared Folders** are folders that can be accessed by at least two **Approvers**.

You must **Assign** a requisition to yourself, in order to move it into your **My Requisition Approvals** folder to take action. **WARNING:** Always Assign the requisition to yourself! This is done to avoid the possibility of two **Approvers** attempting to access the same requisition at the same time.

1. Click **Action Items** (top right).
   
   **NOTE:** If you are the only **Approver** for this folder, the requisition will display as being assigned to you.

2. Click the **Requisitions To Approve** link.

3. In the **Group Results By** drop-down list (top left), select **Folder**.

4. To view all of the requisitions in each folder, click the **Expand All** link.

5. Under the **Action** column, click the **Assign** button for each requisition that you want to assign to yourself.

**WARNING:** If you assign a requisition to yourself and the items have been charged to multiple accounts that you are authorized to approve, a message will display indicating the requisition is in an additional approval folders. Click **Yes**. The requisition will only be listed once in your **My Requisition Approvals** folder; when you take action, it will impact the entire requisition (multiple **Cost Centers**) in one step.

**NOTE:** Once you Assign a requisition to yourself, you may access it from your **My Requisition Approvals** folder at the top of the screen.

6. Click **Action Items** (top right).

7. Click **Requisitions To Approve**.

### Approval Window Navigation: Overview

You may manage your own preferred folder views.

1. Click the **Orders & Documents** icon, hover over **Approvals**, and click **My Approvals**.

2. In the **Group Results By** drop-down list (top left), select either **List** or **Folders**.

3. If you select the **Folder** view, to view all of the requisitions, click the **Expand All** link. To collapse all of the folders, click the **Collapse All** link.
Approval Window Navigation: Show/Hide Requisition Details
You may view the requisitions in your folders with more or less details. The default view is Show More Details.
1. To view fewer details, click the Hide Requisition Details link.
2. To view more detailed information about the requisition, click the Show Requisition Details link.

Approval Window Navigation: Set Results To 100
You are encouraged to set your Results Per Folder to the maximum number. This feature is helpful because you can view all of the requisitions in one folder at a glance.
1. In your My Requisition Approvals folder, click the Results Per Folder down arrow and select 100. Each approval folder will display 100 requisitions in your folder before extending to a Next Page option.

Requisition Review & Approval
After you assign a requisition to yourself, you must review it.
1. In your My Requisition Approvals folder, select the requisition that you want to review by clicking on the Requisition No. link. The requisition will open. By default, the requisition Summary tab is displayed.
2. Under the General section, click the Edit button to make corrections. Make the necessary revisions, and click Save.
3. Under the Shipping section, click the Edit button to make corrections. Make the necessary revisions, and click Save.
4. Under the Cost Center section, verify the cost centers at the Header Level and by Line Item, click the Edit button to make corrections. Make the necessary revisions, and click Save.
5. Under the Natural Account section, verify the natural account in the Header level and verify the natural accounts at the Line level. Click the Edit button to make corrections. Make the necessary revisions, and click Save.
6. Look for additional information under Internal Notes & Attachments and External Notes & Attachments (under the Cost Center section).
7. If a number (#) is displayed on the Comments tab, click the Comments tab to review the comments.
8. If a number (#) is displayed on the Attachments tab, click the Attachments tab to review the attached document. Click on the Attachment to open it.
9. Click the History tab to see if there is a message from Oracle Financial Management System indicating whether or not sufficient funds are available. The History will inform you if sufficient funds are not available in this particular Cost Center. The processing will not stop except in the case of a Grant Account. For a Grant Account, if the requisitioner used a Natural Account that is not authorized for that particular grant, the requisition will be returned with an error. A message will also display in the History.
10. Click the View Approvals tab to view the Approval Workflow Process the requisition has gone through.
11. Once the entire requisition has been reviewed/edited, click the Available Actions down arrow and select the desired action:

Approve/Complete Step
Once you have assigned a requisition to yourself, you may complete the approval step directly from My Requisition Approvals. Always review the requisition before approving it.
1. Open the requisition. In the Available Actions drop-down list, select Approve/Complete Step, and click the Go button.
The requisition has completed the Approver step and has been removed from your queue. You will receive an email verifying this process.

Return To Shared Folder
You may want to return a requisition back to the shared folder for another Approver to review. You may want to do this if you have reviewed the requisition and have questions regarding something on the requisition that you need another approver to review.
1. Open the requisition. In the Available Actions drop-down list, select Return To Shared Folder and click Go.
The requisition has been Returned to the shared folder. Now a different Approver may Assign it to herself.

Place Requisition On Hold
Following your review, you may require additional information for the requisition. As a result, you may Place Requisition On Hold.
1. Open the requisition. In the Available Actions drop-down list, select Place Req On Hold and click Go.
2. In the textbox, enter your Hold Reason.
3. Click the Place Req On Hold button.
The requisition is on Hold. If anyone opens this requisition and clicks the View Approvals tab, they will see it is on Hold.
Return To Requisitioner
Following your review, you may require additional information or changes to be made to the requisition. As a result, you may Return To Requisitioner (the person who prepared the requisition).
4. Open the requisition. In the Available Actions drop-down list, select Return To Requisitioner and click Go.
5. In the textbox, enter your Reason For Return.
6. Click the Return To Requisitioner button.
The Requester/Shopper (the person who prepared the requisition) will receive an email notification indicating the requisition has been returned.

Forward To
Following your review, you may want another Approver to review and approve the requisition. As a result, you may Forward To a different Approver in the system.

NOTE: The Assign A Substitute Approver function is recommended if you will be on vacation or will not be available to process requisition approvals for a certain period of time. Forwarding A Requisition would be done on a case-by-case basis.
1. Open the requisition. In the Available Actions drop-down list, click Forward To and click Go.
2. In the User Search window, enter the search criteria and click the Search button.
3. Only staff assigned the role of Approver will be available in the search results. If you do not find the individual you want to forward the requisition to, it is likely the person has not been assigned the role of Approver in BobcatBUY.
4. Click the Select link next to the appropriate Approver.
5. In the textbox, enter your comment for the new Approver.
6. Click the Forward button.
The new Approver will receive an email notification from BobcatBUY indicating a requisition is pending her approval.

Add Comment
Comments and Attachments may be added by the Shopper, Requester, and Approver.
1. Open the requisition. In the Available Actions drop-down list, select Add Comment and click Go.
2. Under Email Notification(s), click the checkbox if you would like to send a copy of your comment via email to yourself and/or the Requester.
3. To add an additional email recipient, click the Add Email Recipient link and Search for the person that you would like to send a copy of your comment via email. This person must be in the BobcatBUY system.
4. In the textbox, enter your Comment.
5. To add an Attachment, in the Attachment Type drop-down list, select File. Enter a File Name and click the Browse button to navigate to where your file is saved. Double-click the file that you would like to attach, and click Add Comment.

Add Notes To History
You may add a Note to the History of the requisition.
1. Open the requisition. In the Available Actions drop-down list, select Add Notes To History, and click Go.
2. In the textbox, enter your Note and click the Attach button.
The Note has been added to the requisition’s History. If anyone opens this requisition and clicks the History tab, they will see your Note.

Copy To New Cart
You may want to Copy an existing shopping cart to a NEW shopping cart. This may be an order that you want to repeat. If you Copy To New Cart, you become the new cart’s Requisitioner (the person who prepared the requisition).
WARNING: Comments will not be copied to the new cart. Additionally, Punch-Out Catalog suppliers do not support this feature. If the items that you want to copy are from a Punch-Out Catalog, open a NEW cart and create a NEW purchase request.
1. Open the requisition. In the Available Actions drop-down list, select Copy To New Cart, and click Go. A NEW shopping cart summary will open containing the identical items.
2. To rename your new shopping cart, highlight and delete the default Cart Name and enter a new Cart Name.
3. Enter an optional Description for your new shopping cart and click Save.
4. Click Edit Requisition, make the necessary revisions, and click the Assign Cart button. If you are a Requester, click the Submit Requisition button.
5. Verify the Assignee is correct, or select a different Assignee.
6. In the textbox, enter an optional Note to the Assignee, and click the Assign button.

NOTE: The system will copy items from a punch-out catalog, however, punch-out suppliers do not support this feature. As a result, BobcatBUY will display an error message. You must remove the punch-out catalog items to proceed.

Reject Requisition
You may want to Reject the entire requisition.
1. Open the requisition. In the Available Actions drop-down list, select Reject Requisition and click Go.
2. In the textbox, enter your PR Reject Reason.
3. Click the Reject Requisition button.
The entire requisition has been Rejected.
Reject One Or More Line Items
You may want to Reject one line item on the requisition and Approve the purchase of everything else.
1. Open the requisition. In the Supplier/Line Item Details section of the Requisition, click the checkbox at the end of the line item that you want to Reject.
2. Scroll up slightly. In the For Selected Line Items field, choose Reject Selected Items, and click Go.
3. Enter your Reject Line Reason in the textbox.
4. Click the Reject Line Item button.

A Pending Rejection Line Item symbol is now displayed next to the rejected line item.
5. If you are ready to complete the approval process for the remaining line items, in the Available Actions drop-down list, select Approve/Complete Step, and click Go.
At any time you may check the status of the requisitions that you processed.
6. Click the Orders & Documents icon, hover over Approvals, and click My Recent Approvals.
This particular requisition is displayed twice:
- The requisition is displayed once for the Rejected line item.
- The requisition is displayed again for the Approval of the remaining line items.

Assign A Substitute Approver
Most Cost Centers (account numbers) have more than one Approver. The other Approver will need to approve requisitions during your absence or you may Assign a Substitute. You may assign another Approver as your Substitute when you are going to be away for any period of time. **NOTE:** Any carts currently assigned to you must be acted on by YOU. As soon as you Assign a Substitute, any NEW shopping carts assigned to you will be automatically be redirected to your Substitute.

To Assign A Substitute For All Approval Folders (To The Same Person)
1. Click the Orders & Documents icon, hover over Approvals, and click Assign Substitute Approvers.
2. Click the Assign Substitute To All Requisition Folders button (top right). A Assign Substitute window opens.
3. If you would like to Include a Date Range For the Substitution, click the checkbox.
4. You may search for the appropriate substitute by Last Name. Enter your search criteria.
5. Enter the Start/End Date and Time for the substitution.
6. From the search results, choose the appropriate Substitute, click the Assign button. The new Approver's name will appear at the top of the page, confirming your selection.

To Assign A Substitute For One (Or More) Specific Approval Folders
1. Click the Orders & Documents icon, hover over Approvals, and click Assign Substitute Approvers.
2. Click the checkbox/es next to the folder/s that you want to assign a substitute.
3. Next to the Assign Substitute To Selected Folders drop down list, click Go.
4. If you would like to Include a Date Range For the Substitution, click the checkbox.
5. You may search for the appropriate substitute by Last Name. Enter your search criteria.
6. Enter the Start/End Date and Time for the substitution.
7. From the search results, choose the appropriate Substitute. Click the Assign button.

End Substitution
1. Click the Orders & Documents icon, hover over Approvals, and click Assign Substitute Approvers.
2. To End Substitution, click the End Substitute For All Requisition Folders button (top right).
3. The screen will refresh and new carts will no longer be redirected to your Substitute.

View Processed Requisitions
At any time you may check the status of the requisitions that you processed.
1. Click the Orders & Documents icon, hover over Approvals, and click My Recent Approvals
2. Use the Date Range filter (on the left) to modify the date range for the display.
View Comments
When you open a requisition, purchase order, invoice, or receipt, Comments may be viewed through the Comments tab. To track status and view an audit trail, review the History and Comments for the current document that is open OR for all associated information for all document types (requisition, purchase order, invoice, and receipt).

1. Select the requisition to be reviewed by clicking on the Requisition No. link. The requisition will open.
2. To view Comments, click the Comments tab. By default only the comments for the open document are displayed.
3. You may use the Filter to view associated documents. Click the Show Comments For down arrow and select the appropriate document from the drop-down menu or choose All to display Comments for all of the associated documents.

View Others Draft Carts
You may view another BobcatBUY users draft carts in order to answer questions and provide assistance. A Draft Cart is any cart that has not been Submitted into workflow. When viewing someone's draft cart, you will see a Summary; it does not display comments or attachments. Likewise, it does not display details pertaining to Shipping, Cost Center, or Natural Account values that have been modified at the line level.

1. Click the Shop icon, hover over Admin, and click View Draft Carts From Other Users.
2. To access the desired shopping cart, click the Shopping Cart Name. The Summary view of the draft requisition displays.

Quick Search
Any OHIO BobcatBUY user may access any requisition in the system. If you know the requisition number, you may use the Quick Search feature (top right).

1. To perform a Quick Search, click the Magnifying Glass icon (top right).
2. In the Quick Search fields, click to select the type of document you want to search for and enter the Number and press Enter.

NOTE: If you view the History for All, the display adds an Applies To column; this column lists the document name to which the specific row of history information applies.

If you want to search for any document with a specific number, in the type field, click Document and enter the Number you want to search for. The search results will display any document with this number.