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Questions? Call 597-6446 or email financelcustomercare@ohio.edu
I. Welcome Message

On Ohio University’s home page, click the Faculty/Staff button. Select the BobcatBUY link and enter your Ohio ID and Password.

**NOTE:** Upon initial login you will be asked to accept Terms and Conditions/BobcatBUY User Agreement. Read the entire agreement and click Accept.

```
BobcatBUY User Agreement

1. I understand that BobcatBUY is a procurement and financial system with direct connectivity to the University's live financial system. As a result, I understand that I have a fiduciary responsibility associated with the use of this system.

2. I understand that procurement of all goods and services must have a clearly defined Ohio University business purpose and that I may not make personal purchases of any kind, even if my intent is to reimburse the university, in the furtherance of my duties as an end user at Ohio University.

3. I have read, understand, and affirm compliance with all related Ohio University Purchasing Policies from #55.002 through #55.075 (http://www.ohio.edu/policy/numeric.html#BUSINESS) and agree to follow the established guidelines and processes when procuring goods and/or services on behalf of my role at Ohio University.

4. I understand that Ohio University can terminate my right to use BobcatBUY at any time and/or for any reason.

5. I understand that failure to comply with Ohio University policies and procedures may result in revocation of my BobcatBUY user privileges or other disciplinary or legal actions, up to and including termination of employment.

6. I understand that “Conflicts of Interest” occur when an employee or immediate family member receives personal financial benefit from the employee’s University position in a manner which may inappropriately influence the employee’s judgment or compromise the employee’s ability to carry out University responsibilities or could be a detriment to the University’s integrity. It is important to note that employees should avoid any activity that may be perceived as a conflict of interest even if a conflict of interest does not technically exist.

7. I understand that employees of Ohio University may not accept gifts, trips, or meals from current or future potential vendors.

email: procurement@ohio.edu
phone: +1 (740) 597-6446

Accept  Reject
```

Important announcements and training links are displayed in the Message window located on the left side of the page.

To logout of BobcatBUY, click the black Logout button (right side of screen, under the quick search link) or click on your Name (top right) and click Logout.
II. Overview Of Forms

Forms are used to purchase items/services outside of hosted and punch-out catalogs, and non-catalog items. Forms are a fully customizable way to request items and services. Forms may be viewed by all BobcatBUY users. There are several types of forms available in BobcatBUY.

You may access the forms from the Shop menu (on the left)

Or you may access the forms from the Internal Forms area at the bottom of the Home/Shop screen.

There are several forms available in BobcatBUY:

- Request To Add New Supplier
- Blanket Order Form
- Service Agreement Purchase Order
- Sub-Contract Agreement Purchase Order
- Direct Payment Form
- Change Order Request
- Close PO Request

**WARNING:** Each type of Form must be created in a NEW Cart. After you complete a form, you must process your Active Shopping Cart.
1. To access the Forms, click the Shop menu (on the left) and click View Forms (Shop > Shopping > View Forms).

![Shop Menu Screenshot]

**NOTE:** The first time you access the forms, you must click the Organization Forms link (on the left).

![Organization Forms Screenshot]

2. Click the desired Form or click the View Form button next to the appropriate form.

![Organization Forms List Screenshot]
NOTE: There are instructions specific to each form on the left border area of the form. Please read the instructions. The bold fields are required fields on every form. You must complete all of the bold fields before submitting the form.

3. After you complete the form, scroll to the top of the form. In the Available Actions dropdown list, select Add And Go To Cart and click Go. The form is now located in your Active Shopping Cart. You must process the cart as usual. The shopping cart is the vehicle used to transport the form to Procure To Pay.

III. How Do I Make Changes To A Form That Is In My Active Shopping Cart?

If you need to make changes to a form or if you receive an error message on the shopping cart’s Summary screen, you must open the form to make corrections.

1. To open the form, click its Description.

2. Make your revisions.

3. Under the Available Actions dropdown list, verify that Save is displayed and click Go.

4. Click the Close button.

5. Click Edit Requisition to process the cart.

IV. If I Receive The Invoice, How Do I Send It To Procure To Pay?

If you receive an invoice that should have been sent directly to the Procure To Pay office, you may do one of the following:

1. Email the invoice (as long as there are no social security numbers visible on the invoice) to accounts.payable@ohio.edu

2. Fax the invoice to the Finance Customer Care at Fax: 593-9890.

3. Campus mail the invoice to the Finance Customer Care, 204 WUSOC (formerly HDL Center).

WARNING: Do not attach an invoice to a Purchase Order; Procure To Pay will not receive it.
V. Process More Than One Form Of The Same Type In A Cart

**WARNING:** Each type of form should be created in a NEW shopping cart. A separate form must be completed for each unique line item being expensed to different *Natural Account Codes*. Multiple forms completed for the same *Supplier*, but for different line items should be added to the same *shopping cart*. (This is applicable for all forms except the Change Order Request, Close PO Request, and the Request To Add New Supplier).

This process must be used when you have a supplier providing goods and/or services that must be expensed to different *Natural Account Codes*. For example, one PO form produces one line on the requisition. When you click the **Edit Requisition** button, there will only be one line to expense a *Natural Account*. In order to expense a different *Natural Account Code* for a separate line item, you must add a second form to the cart and specify a different *Natural Account Code* for the second line item or service. By doing this, when you click the **Edit Requisition** button, there will be two line items displayed. Both forms must be created for the *same Supplier*, however each line item may be expensed to a different *Natural Account Code*. Once the requisition moves through the approval process, **one** Purchase Order is created.

VI. Blanket Order Form

**WARNING:** Each type of Form must be created in a NEW shopping cart. A separate form must be completed for each unique line item being expensed to a different *Natural Account Code*. Multiple forms completed to the same *Supplier*, but for different line items should be added to the same *shopping cart*.

A Blanket Order Form is commonly referred to as a “Blanket Purchase Order.” This form will create a purchase order for recurring, non-catalog transactions. A Blanket Order can accommodate multiple invoices over an extended period of time. If an item is ordered in BobcatBUY, it is not a Blanket Order.

Examples of a Blanket Order include temporary services (water cooler service), utilities, and photocopier leases/maintenance agreements.

All Blanket Orders will be reviewed by **Procure To Pay** before processing. If the item is not an actual item that should be listed on a Blanket Order, it will be Rejected by **Procure to Pay**. They will inform you of the proper form or process to use in order to get your product/s ordered.
1. Under the Internal Forms area at the bottom of the Home/Shop screen, click Blanket Order Form.

You must complete all of the bold fields on the form before submitting it. The BOLD fields are required.

2. In the Supplier Information field, enter the Supplier name or click the Supplier Search link.
The Supplier must be preloaded in BobcatBUY.

3. When the supplier is selected, if there is more than one fulfillment center, the preferred fulfillment center will display by default. It can be changed by clicking the Select Different Fulfillment Center link.

4. Click the Select button next to the appropriate Fulfillment Center.

5. In the Product Description field, enter the Description of the product/service that will be included in this standing order.

6. In the Commodity Code field, enter the appropriate Commodity Code for the requested item, or click the Search link. Enter an optional Description or click the Search button and click Select next to the desired commodity code. There are three pages of commodity codes to choose from.

7. In the Quantity field, enter the Price (the quantity should reflect the total value in cents of the order without a decimal point). EXAMPLE: a $100 order should be entered with a quantity of 10000. (Do not include the dollar “$” symbol.)

Why is the Quantity (Price) field completed this way on the Blanket Order Form? The Quantity (Price) field is completed this way so multiple invoices may be paid against the purchase order and the quantity is not affected.

8. Enter the Start Date and End Date in the mm/dd/yyyy format during which the products and services will be received.

NOTE: The Blanket Purchase Order End Date cannot exceed June 30, with exceptions for specific grants.

9. Scroll to the top of the form. Under the Available Actions dropdown list, select Add And Go To Cart and click Go.

10. The completed form is now in your Active Shopping Cart. Click your Active Shopping Cart (top right) to process the cart.

11. In the Cart Name field, enter a NEW Name and an optional Description.
12. Click **Save**.

13. Click the **Edit Requisition** button to process the cart. See Cart and Assign Document for further instruction on this process.

**NOTE**: After this form is added to your cart, a History tab will display the next time you access this form. The History tab at the top of the form displays a list of actions performed (additions, deletions, modifications) since the form was created. This may be exported as a .csv file.

14. If you need to make changes to the Blanket Order Form or if you receive an error message, you must open the form to make corrections.

15. Click the form’s **Description** or the form’s icon to open the form.

16. When the form opens. Make the necessary revisions.
17. Scroll to the top of the form. Under the Available Actions dropdown list, verify that Save is displayed and click Go. **WARNING:** Changing the Available Actions to “Add and Go To Cart” will result in adding two (2) of the exact same forms to the same cart. If this happens, delete one of the duplicate forms.

18. Click the Close button.

19. The form is now located in your Active Shopping Cart. You must process the cart as usual. Click the Active Shopping Cart and click the Edit Requisition button to process the cart.

VII. Direct Payment Form

**WARNING:** Each type of form must be created in a NEW shopping cart. A separate Direct Payment form must be completed for each unique line item on the invoice expensed to a different Natural Account Code. Multiple Direct Payment forms completed to the same Supplier for the same invoice should be added to the same shopping cart.

Complete a Direct Payment Form for an invoice that has been received for which a purchase order has not previously been completed. A scanned image of the invoice must be attached in order to process the form.

**NOTE:** A purchase order will not be sent to the supplier, but rather processed internally for payment purposes only.

**WARNING:** You will need to create as many lines as needed to designate the different Natural Account Codes by creating a DP for each expense Line (that has a unique natural account code) and adding each of these to the same shopping cart. You must attach the same Invoice to each Direct Payment added to the Shopping Cart. Then when you edit the shopping cart each Direct Payment will be a separate Line Item. You must assign a different Natural Account code to each Line Item.
**REMANDER:** Each DP that is associated with the same invoice must be attached to the same shopping cart/requisition. On the other hand, with the exception of the above scenario, only one DP should be added to a shopping cart.

1. Under the **Internal Forms** area at the bottom of the **Home/Shop** screen.

2. Click **Direct Payment Form**.

![Internal Forms](image)

You must complete all of the bold fields on the form before submitting it. The BOLD fields are required.
3. In the Supplier Info field, enter the Supplier name or click the Supplier Search link.

The Supplier must be preloaded in BobcatBUY.

4. When the supplier is selected, if there is more than one fulfillment center, the preferred fulfillment center will display by default. It can be changed by clicking the Select Different Fulfillment Center link.

5. Click the Select button next to the appropriate Fulfillment Center.

6. In the Catalog No./Product Description field, enter the Description of the product/service that was received/rendered.
7. In the Commodity Code field, enter the appropriate Commodity Code for the product/service that was received/rendered, or click the Search link. Enter an optional Description or click the Search button and click Select next to the desired commodity code. There are three pages of commodity codes to choose from.

8. In the Quantity field, enter the Quantity of the product/s or service/s that were received/rendered.

9. In the Price field, enter the Price. Enter the Price to the cent with a decimal point. (Do not include the dollar “$” symbol.)

10. In the UOM field, enter the optional Unit Of Measure.

11. In the Justification Description field, enter specific details pertaining to this Direct Payment. It is recommended that you elaborate on the information provided in the Catalog No./Product Description field. This field provides 1000 characters for specific details.

**WARNING: An Attachment is REQUIRED!** Under Attachments, you must attach a scanned image of the Invoice for the Direct Payment. Only ONE invoices should be attached to the form, however multiple attachments are allowed. The original invoice does not have to be sent to Procure To Pay, however, Ohio Law states that a department must maintain the original document on file.

12. To Attach the Invoice, click the Add Attachment link.

13. Click “Select files...” button to navigate to the location where your file is saved

14. Choose the “file to Attach”

15. Click “Select Files...” to add another file (Repeat for each additional file).

16. Click “Save” when all files have been added.
17. Scroll to the top of the form. Under the Available Actions dropdown list, select Add And Go To Cart and click Go.

18. The completed form is now in your Active Shopping Cart. Click your Active Shopping Cart (top right) to process the cart.

19. In the Cart Name field, enter a NEW Name and an optional Description.

20. Click Save.

21. Click the Edit Requisition button to process the cart. See Cart and Assign Document for further instruction on this process.

22. If you need to make changes to the Direct Payment form or if you receive an error message, you must open the form to make corrections.

23. Click the form’s Description or the form’s icon to open the form.
24. When the form opens. Make the necessary revisions.

25. Scroll to the top of the form. Under the *Available Actions* dropdown list, verify that *Save* is displayed and click *Go*. **WARNING:** Changing the *Available Actions* to “Add and Go To Cart” will result in adding two (2) of the exact same forms to the same cart. If this happens, delete one of the duplicate forms.

26. Click the *Close* button.

27. The form is now located in your *Active Shopping Cart*. You must process the cart as usual. Click the *Edit Requisition* button to process the cart. See Cart and Assign Document for further instruction on this process.
VIII. Change Order Request Overview

**WARNING:** Each type of Form should be created in a NEW shopping cart.

The **Change Order Request Form** is used to request account changes to current, open purchase orders, revise period of performance (begin and end dates), add or reduce funds on an open Purchase Order, and add lines to an open PO. Once this form is submitted in the cart, *Procure To Pay* will make the appropriate changes to the existing purchase order in Oracle Financial Management System (FMS). If you have multiple changes to multiple lines on the Purchase Order, attach documentation detailing the changes.

**WARNING:** This form cannot be used if a PO is closed. However, if the PO is in a *Soft Close* status changes can still be made. A journal entry must be completed to update the accounting distribution associated with the invoice.

Use this Change Order Request to:
- Request account changes to current, open POs
- Revise period of performance (begin and end date)
- Add or reduce funds on an open PO.
- Add lines to an open PO.

**How to verify if an Invoice has been entered:**
1. Click the Quick Search button (top right) next to your Active Shopping Cart.
2. In the Search field, click Purchase Order Number. Enter the Purchase Order Number that you would like to search for and click the Magnifying Glass.
3. Click the Invoices tab.

   If there are no invoices or a partially paid invoice for this PO, you may complete this form.
IX. Change Order Request

1. Under the Internal Forms area at the bottom of the Home/Shop screen.

2. Click Change Order Request.

You must complete all of the bold fields on the form before submitting it. The BOLD fields are required.
3. In the PO Number field, enter the **PO Number** that you would like to revise.

4. In the Supplier/Payee Name field, enter the **Supplier Name**.

5. In the Line Number(s) If Applicable field, enter the **Line Number/s**.

6. In the **PO Total** field, enter the original **PO Total** amount.

7. Scroll down and enter the **Description Of Change**. Include specific details about what you would like to revise.

8. In the **Change Account Number From** field, enter the account number listed on the original Purchase Order. Use this field if you are changing account numbers to be charged on the Purchase Order.
9. In the **Change Account Number To** field, enter the account number to which you want to expense the products/services. You will use this field if you are changing account numbers to be charged on the Purchase Order.

10. In the **New Begin Date** field, enter the new beginning date of the period of performance. You will use this field if you are revising the period of performance on the original PO.

11. In the **New End Date** field, enter the new ending date of the period of performance. You will use this field if you are revising the period of performance on the original PO.

12. To add an **Attachment**, click the **Add Attachment** link.

13. Click the **Browse** button to navigate to where your file is saved. Double-click to select the file that you would like to attach, and click **Save**.

14. Scroll to the top of the form. Under the **Available Actions** dropdown list, select **Add And Go To Cart** and click **Go**.

15. The completed form is now in your **Active Shopping Cart**. Click your **Active Shopping Cart** (top right) to process the cart.

16. In the **Cart Name** field, enter a **NEW Name** and an optional **Description**.
17. Click Save.

18. Click the Edit Requisition button to process the cart. See Cart and Assign Document for further instruction on this process.

19. If you need to make changes to the Change Order Request or if you receive an error message, you must open the form to make corrections.

20. Click the form’s Description or the form’s icon to open the form.

21. When the form opens. Make the necessary revisions.

22. Scroll to the top of the form. Under the Available Actions dropdown list, verify that Save is displayed and click Go. **WARNING:** Changing the Available Actions to “Add and Go To Cart” will result in adding two (2) of the exact same forms to the same cart. If this happens, delete one of the duplicate forms.

23. Click the Close button.

24. The form is now located in your Active Shopping Cart. You must process the cart as usual. Click the Edit Requisition button to process the cart. See Cart and Assign Document for further instruction on this process.
X. Close PO Request

The Close PO Request is used to request closure of a PO or multiple PO’s. Once the Close PO Request is submitted in the cart, a procurement staff member will make the appropriate changes to the existing PO in BobcatBUY and Oracle FMS.

**WARNING**: Each type of Form should be created in a NEW shopping cart.

1. Under the Internal Forms area at the bottom of the Home/Shop screen.

2. Click on the Close PO Request.

You must complete all of the bold fields on the form before submitting it. The BOLD fields are required.
3. In the **PO Number** field, enter the **PO Number** that you would like to close.

4. In the Supplier/Payee Name field, enter the **Supplier Name**.

5. In the **PO Total** field, enter the original **PO Total** amount.

6. Scroll down and list additional **PO Numbers to close** in the **Description of Change** section. You must include the Supplier/Payee name for each PO.
7. Enter the commodity code that was listed on the original PO. Only one commodity code is required if you list additional PO numbers to close in the Description of Change section.

8. Scroll to the top of the form. Under the Available Actions dropdown list, select Add And Go To Cart and click Go.

9. The completed form is now in your Active Shopping Cart. Click your Active Shopping Cart (top right) to process the cart.

10. In the Cart Name field, enter a NEW Name and an optional Description.

11. Click Save.

12. Click the Edit Requisition button to process the cart. See Cart and Assign Document for further instruction on this process.

13. If you need to make changes to the Change Order Request or if you receive an error message, you must open the form to make corrections.

14. Click the form's Description or the form's icon to open the form.

15. When the form opens. Make the necessary revisions.
16. Scroll to the top of the form. Under the Available Actions dropdown list, verify that Save is displayed and click Go. **WARNING:** Changing the Available Actions to “Add and Go To Cart” will result in adding two (2) of the exact same forms to the same cart. If this happens, delete one of the duplicate forms.

17. Click the Close button.

18. **The form is now located in your Active Shopping Cart. You must process the cart as usual.** Click the Edit Requisition button to process the cart. See Cart and Assign Document for further instruction on this process.

**XI. Request To Add New Supplier**

**WARNING:** Each type of Form should be created in a NEW shopping cart.

The Request To Add New Supplier form is to be used when a Supplier does not already exist in BobcatBUY. Once this form is submitted in the shopping cart, it will go to Procure To Pay for consideration. Upon approval and receipt of all of the appropriate forms, the supplier will be added to BobcatBUY. You will be notified via email, if the supplier is approved and has been made available within BobcatBUY. Once the supplier is entered into BobcatBUY, you may order your item from the newly added supplier. If the supplier is not approved to be added to BobcatBUY, you will be notified by a Procure To Pay staff member.

**NOTE:** The OHIO Substitute W-9 form (former Payment Compliance Form / PCF) is required for any supplier to which Ohio University makes a payment for reimbursement, goods, or services.

If you are completing a Request To Add New Supplier, you are encouraged to share the link to the OHIO Substitute W-9 and ask the supplier to complete it. Often, suppliers respond more swiftly to customers who want to place an order. The OHIO Substitute W-9 must be signed by the supplier (not the OU representative) and it must include a written signature from the supplier. You may attach an electronic copy of the completed OHIO Substitute W-9 to BobcatBUY’s Request To Add New Supplier form. Or you may campus mail the completed original OHIO Substitute W-9 to Finance Customer Care, WUSOC (formerly HDL Center), Room 204. Or you may fax the completed OHIO Substitute W-9 to Finance Customer Care at Fax: 593-9890.

**WARNING:** If you scan or fax the completed OHIO Substitute W-9, SHRED the hardcopy original!
The **OHIO Substitute W-9** is available online:

http://www.ohio.edu/finance/forms/financeforms.cfm

**IMPORTANT:** Always share the LINK to this form with suppliers, so they access the most recent version of the form. Do not download the form, save it to your hard drive, and send it to suppliers. If you share the actual form, it may not be the most up-to-date version of the form. Always share the LINK to the form.

**Instructions for Suppliers - OHIO Substitute W-9:**

1. Visit: http://www.ohio.edu/finance/forms/financeforms.cfm
2. Click **Procure To Pay**.
3. Scroll down and click **OHIO Substitute W-9 (former Payment Compliance Form)**.
   This form is required for any supplier to which Ohio University makes a payment for reimbursement, goods, or services.

You may *attach* the completed **OHIO Substitute W-9** to your **Request to Add New Supplier** form or when you click **Edit Requisition** to process the cart, it may be attached under *Internal Notes and Attachments*.

If you do not want to solicit the **OHIO Substitute W-9** from the supplier, include a Comment to **Procure To Pay** indicating your preference. After two unsuccessful attempts to obtain the **OHIO Substitute W-9**, a **Procure To Pay** staff will contact you for assistance. If a **Request To Add New Supplier** form is returned to you for any reason, you must **Submit/Assign** it again.

1. Under the **Internal Forms** area at the bottom of the **Home/Shop** screen.
2. Click **Request To Add New Supplier**.

---

**Shopper, Requester, and Approver**

Forms – v 13.3

Questions? Call 597-6446 or email financecustomercare@ohio.edu
You must complete all of the bold fields on the form before submitting it. The BOLD fields are required.

3. Under Vendor Contact Information, enter the Vendor’s Name, Street Address, City, State, Country (for international suppliers), and Zip Code. Enter the vendor’s Billing Address, a Contact Name, Phone Number, Email Address, and Fax Number.

4. In the Commodity Code field, enter the appropriate Commodity Code for the product/service, or click the Search link. Enter and optional Description or click the Search button and click Select next to the desired commodity code. There are three pages of commodity codes to choose from.

5. In the Vendor Add Reason/Intended Purchase Details field, enter specific Details as to why you would like to have this supplier added to BobcatBUY. Additionally, include a Description of the items that you intend to purchase. **NOTE: This justification is critical in the decision**
regarding whether or not to add this supplier to BobcatBUY. If there is already a supplier in
BobcatBUY who offers similar products/services, specify why you want to purchase from
this particular supplier.

6. Under Attachments, attach all supporting documents here, including a copy of the contract,
quote, Ohio Bureau of Workers’ Compensation (BWC) Certificate of Premium Payment,
Certificate of Liability Insurance, and/or the OHIO Substitute W-9 form. Do not duplicate
these attachments in “Internal Notes and Attachments” on the requisition.

7. To add an Attachment, click the Add Attachment link.

8. Click “Select files...” button to navigate to the location where your file is saved.

9. Choose the “file to Attach”.

10. Click “Select Files...” to add another file (Repeat for each additional file).

11. Click “Save” when all files have been added.

12. In the Estimated Annual Spend field, enter an estimate of how much you plan to spend with
this supplier during the next twelve months. Enter a whole number. (Do not include the
dollar “$” symbol.)

13. Scroll to the top of the form. Under the Available Actions dropdown list, select Add And Go
To Cart and click Go.

12. The completed form is now in your Active Shopping Cart. Click your Active Shopping Cart
(top right) to process the cart.

13. IMPORTANT: In the Cart Name field, enter the New Supplier NAME and click Save.
14. Click the **Edit Requisition** button to process the cart. See Cart and Assign Document for further instruction on this process.

15. If you need to make changes to the *Request To Add New Supplier* Form or if you receive an error message, you must open the form to make corrections.

16. Click the form’s *Description* or the form’s icon to open the form.

![Image of Supplier/Line Item Details]

17. When the form opens. Make the necessary revisions.

18. Scroll to the top of the form. Under the *Available Actions* dropdown list, verify that **Save** is displayed and click **Go**. **WARNING:** Changing the *Available Actions* to “Add and Go To Cart” will result in adding two (2) of the exact same forms to the same cart. If this happens, delete one of the duplicate forms.

19. Click the **Close** button.

![Image of Available Actions]

20. **The form is now located in your Active Shopping Cart.** You must process the cart as usual. Click the **Active Shopping Cart** and click the **Edit Requisition** button to process the cart...

**NOTE:** There are **REQUIRED fields**! In the *Edit Requisition* window, you must add BOTH a *Cost Center* (account number) and a *Natural Account Code*. This is **REQUIRED**, however, it does not affect the workflow process. The workflow for this form is actually based on the *Commodity Code* specified on the form. Because this is simply a Request To Add A New Supplier into BobcatBUY, no *Cost Center* is charged and no *Natural Account Code* is expensed.
XII. Service Agreement Purchase Order

A Service Agreement Purchase Order form will create a purchase order for recurring, non-catalog transactions for service agreements. A Service Agreement Purchase Order can accommodate multiple invoices over an extended period of time.

NOTE: This Form should not be used for Sub-Contract Agreements. Refer to the Sub-Contract Agreement Form.

WARNING: Each type of form should be created in a NEW shopping cart. A separate form must be completed for each unique line item being expensed to a different Natural Account Code. Multiple forms completed to the same Supplier, but different line items should be added to the same shopping cart.

EXAMPLE: You may create a shopping cart that includes the same type of form if you are using the same supplier. This process must be used when you have a supplier providing goods and/or services that must be expensed to different natural account codes. For example, one PO form produces one line on the requisition. When you click the Edit Requisition button, there will only be one line to which you may expense a natural account code. In order to expense a different natural account code to part of the goods and/or services provided, you must add a second PO Form to the cart with the additional goods/or service listed. Next, when you click the Edit Requisition button you will now have two line items, both PO Forms have been created using the same supplier but different expense types. At that time you may assign a different Natural Account Code to each line. Once the requisition moves through the approval process, one Purchase Order number is created.

1. Under the Internal Forms area at the bottom of the Home/Shop screen.

2. Click Service Agreement Purchase Order.

You must complete all of the bold fields on the form before submitting it. The BOLD fields are required.
3. Under Supplier Information, enter the Supplier name or click the Supplier Search link.

The Supplier must be preloaded in BobcatBUY.

4. When the supplier is selected, if there is more than one fulfillment center, the preferred fulfillment center will display by default. It can be changed by clicking the Select Different Fulfillment Center link.
5. Click the **Select** button next to the appropriate **Fulfillment Center**.

6. In the **Product Description** field, enter the **Description** of the services covered by this **Service Agreement**.

7. In the **Commodity Code** field, enter the appropriate **Commodity Code** for the product/service, or click the **Search** link. Enter and optional **Description** or click the **Search** button and click **Select** next to the desired commodity code. There are three pages of commodity codes to choose from.

8. In the **Quantity** field, enter the **Price** (the quantity should reflect the total value in cents of the order **without** a decimal point). **EXAMPLE:** A $100 order should be entered with a quantity of 10000. *(Do not include the dollar “$” symbol.)*

9. Enter the **Start Date** and **End Date** in the **mm/dd/yyyy** format during which the services will be received.

![These Date Fields are REQUIRED](image)

**NOTE:** The Service Agreement Purchase Order **End Date** cannot exceed **June 30**, with exceptions for specific grants.

10. Scroll to the top of the form. Under the **Available Actions** dropdown list, select **Add And Go To Cart** and click **Go**.
11. The completed form is now in your Active Shopping Cart. Click your Active Shopping Cart (top right) to process the cart.

12. In the Cart Name field, enter a NEW Name and an optional Description.

13. Click Save.

14. Click the Edit Requisition button to process the cart. See Cart and Assign Document for further instruction on this process.

15. If you need to make changes to the Request To Add New Supplier form or if you receive an error message, you must open the form to make corrections.

16. Click the form’s Description or the form’s icon to open the form.

17. When the form opens. Make the necessary revisions.

18. Scroll to the top of the form. Under the Available Actions dropdown list, verify that Save is displayed and click Go. WARNING: Changing the Available Actions to “Add and Go To Cart” will result in adding two (2) of the exact same forms to the same cart. If this happens, delete one of the duplicate forms.
19. Click the **Close** button.

![Available Actions: Save, Go, Close]

20. **The form is now located in your Active Shopping Cart.** You must process the cart as usual. Click the **Edit Requisition** button to process the cart. See Cart and Assign Document for further instruction on this process.

**XIII. Sub-Contract Agreement Purchase Order**

A Sub-Contract Agreement Purchase Order form will create a purchase order for recurring, non-catalog transactions for sub-contract agreements. If you have a **Grant-funded Sub-Award** or **Service Provider Agreement**, use this form. A Sub-Contract Agreement Purchase Order can accommodate multiple invoices over an extended period of time.

**WARNING:** Each type of Form should be created in a NEW shopping cart. A separate form must be completed for each unique line item being expensed to a different **Natural Account Code**. Multiple forms completed to the same **Supplier** but different line items should be added to the same **shopping cart**.

**EXAMPLE:** You may create a shopping cart that includes the same type of form if you are using the same supplier. This process must be used when you have a supplier providing goods and/or services that must be expensed to different natural account codes. For example, one PO form produces one line on the requisition. When you click the **Edit Requisition** button, there will only be one line to which you may expense a natural account code. In order to expense a different natural account code to part of the goods and/or services provided, you must add a second PO Form to the cart with the additional goods/or service listed. Next, when you click the **Edit Requisition** button you will now have two line items, both PO Forms have been created using the same supplier but different expense types. At that time you may assign a different **Natural Account Code** to each line. **Once the requisition moves through the approval process, one Purchase Order number is created.**

1. Under the **Internal Forms** area at the bottom of the **Home/Shop** screen.

2. Click **Sub-Contract Agreement Purchase Order**.
You must complete all of the bold fields on the form before submitting it. The BOLD fields are required.
3. Under Supplier Information field, enter the Supplier name or click the Supplier Search link.

The Supplier must be preloaded in BobcatBUY.

4. When the supplier is selected, if there is more than one fulfillment center, the preferred fulfillment center will display by default. It can be changed by clicking the Select Different Fulfillment Center link.

5. Click the Select button next to the appropriate Fulfillment Center.

6. In the Product Description field, enter the Description of the services covered by this Sub-Contract Agreement.

7. In the Commodity Code field, enter the appropriate Commodity Code for the product/service, or click the Search link. Enter and optional Description or click the Search button and click Select next to the desired commodity code. There are three pages of commodity codes to choose from.

8. In the Quantity field, enter the Price (the quantity should reflect the total value in cents of the order without a decimal point). **EXAMPLE:** A $100 order should be entered with a quantity of 10000. (Do not include the dollar “$” symbol.)

9. Enter the Start Date and End Date in the mm/dd/yyyy format during which the services will be received.

**NOTE:** The Sub-Contract Agreement Purchase Order End Date cannot exceed June 30, with exceptions for specific grants.
10. Scroll to the top of the form. Under the Available Actions dropdown list, select **Add And Go To Cart** and click **Go**.

11. The completed form is now in your **Active Shopping Cart**. Click your **Active Shopping Cart** (top right) to process the cart.

12. In the **Cart Name** field, enter a NEW Name using the following naming convention for services (sub-award or consulting):

   **IMPORTANT:** If your **Project** is a G, UE, or P, enter “SUB-UTxxxxx (Uniterm #)-Supplier Name”

   **EXAMPLE:** SUB-UT12345-VWR International

13. Enter an optional **Description** and click **Save**.

15. Click the **Edit Requisition** button to process the cart. See Cart and Assign Document for further instruction on this process.

16. If you need to make changes to the **Sub-Contract Agreement Purchase Order** form or if you receive an error message, you must open the form to make corrections.

17. Click the form’s **Description** or the form’s icon to open the form.
18. When the form opens. Make the necessary revisions.

19. Scroll to the top of the form. Under the *Available Actions* dropdown list, verify that *Save* is displayed and click *Go*. **WARNING:** Changing the *Available Actions* to “Add and Go To Cart” will result in adding two (2) of the exact same forms to the same cart. If this happens, delete one of the duplicate forms.

20. Click the *Close* button.

21. *The form is now located in your Active Shopping Cart. You must process the cart as usual.*

   Click the *Edit Requisition* button to process the cart. See Cart and Assign Document for further instruction on this process.
XIV. Internal Notes And Attachments (Attach Quotes, Bids, etc.)

Click the Active Shopping Cart and click the Edit Requisition button to process the cart. Click the Internal Notes And Attachments tab. You may use this to attach a quote, or multiple quotes/bids that will be visible internally (OHIO BobcatBUY users), but NOT externally (suppliers).

1. To add Internal Notes, click the Internal Notes And Attachments tab (top of screen).

2. Under Internal Notes and Attachments, click the Edit button and enter any information that is pertinent to the processing/review of your request.

3. Click Save.

4. To add an Attachment, click the Add Attachment link.

5. Click “Select files...” button to navigate to the location where your file is saved.

6. Choose the “file to Attach”

7. Click “Select Files...” to add another file (Repeat for each additional file).

8. Click “Save” when all files have been added.

9. To move Internal Attachments to External attachments
   a. Select the drop down menu next to remove
   b. Select Move to External Attachments

10. To add a Link/URL, click the Add Attachment link.

11. When the Attachments window opens, under Attachment Type, click the down-arrow and select Link/URL. Enter a File/URL Name. This is the File Name that will display in BobcatBUY.

12. Enter and the Link/URL. EXAMPLE: www.ohio.edu

13. Click Save.

To remove an Attachment, click the Remove link next to the Attachment/URL that you would like to remove and click the Remove button to confirm your selection.
XV. **External Notes And Attachments to Suppliers (Attach Quotes, etc.)**

Click the **Active Shopping Cart** and click the **Edit Requisition** button to process the cart. Click the **External Notes And Attachments** tab. You may use this to attach a quote, or multiple quotes/bids that will be visible internally and sent externally with the purchase order to the suppliers. To add **External Notes**, click the **External Notes And Attachments** tab (top of screen).

1. Under **External Notes and Attachments**, click the **Edit** button and enter any information that is pertinent to the processing/review of your request.

2. Click **Save**.

3. To add an **Attachment**, click the **Add Attachment** link.

4. Click “**Select files...**” button to navigate to the location where your file is saved

5. Choose the “**file to Attach**”

6. Click “**Select Files...**” to add another file (Repeat for each additional file).

7. Click “**Save**” when all files have been added.

8. To add a **Link/URL**, click the **Add Attachment** link.

9. When the **Attachments** window opens, under **Attachment Type**, click the down-arrow and select **Link/URL**. Enter a **File/URL Name**. This is the **File Name** that will display in BobcatBUY.

10. Enter and the **Link/URL**. **EXAMPLE:** www.ohio.edu

11. Click **Save**.

12. To move External Attachments to Internal Attachments
   a. Select the drop down menu next to remove
   b. Select Move to Internal Attachments