# User Profile

---

## Table of Contents

I. Welcome Message ........................................................................................................... 2  
II. Customize Your BobcatBUY Profile ............................................................................. 3  
III. Add A Default Shipping Address ............................................................................... 5  
IV. Delete A Shipping Address ......................................................................................... 10  
V. Add A Default Cart Assignee ...................................................................................... 11  
VI. Add A Default Account Number (Cost Center) ......................................................... 13  
VII. Remove An Account Number .................................................................................... 17  
VIII. Add A **Null Project** Account Number (Cost Center) ......................................... 17  
IX. Add An Account Number Combination As A Code Favorite **(Account Split)** 23  
X. Approve Directly From Email: Setup An Email Approval Code **(For Approvers Only)** .......................................................................................................................... 27  
XI. Review Permissions .................................................................................................. 29  
XII. View History Of All Profile Changes ........................................................................ 30  
XIII. Add A Comment To Profile ..................................................................................... 31  
XIV. Modify Email Preferences And **NEW** Notifications ............................................ 32  
XV. What Is My Role In The System? ................................................................................ 34  
XVI. **NEW** Menu Search ............................................................................................ 34  
XVII. **NEW** Set My Home Page .................................................................................. 36  
XVIII. **NEW** Managing Page Bookmarks .................................................................... 37
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.

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. Customize Your BobcatBUY Profile

NOTE: The Phoenix interface is not available for IE7 or for IE8 and IE9 in compatibility mode. If you are using one of these browsers you will be reverted to the Classic interface. You will also receive a message stating that your browser is not supported. Please update your IE browser.

1. Click the down-arrow to the right of your name.
2. Click the View My Profile link.

3. Click the User Information and Settings link.

4. Click the Language, Time Zone and Display Settings link.
5. Select **Language**, **Country** (United States), **Currency** (USD), and **Time Zone** (EDT/EST Eastern Standard Time).

6. You may also customize your **Color Theme** for easier viewing.

![Language, Time Zone and Display Settings](image)

**NOTE:** Phoenix is not available for IE7 or for IE8 and IE9 in compatibility mode. If you are using one of these browsers and attempt to switch to the Phoenix interface, you will be reverted to the Classic interface and a message will be sent to you indicating that your browser is not supported. If you receive this message, you must update your IE browser.

7. If you would like to use BobcatBUY via screen reader, select the **Enable Accessibility Mode** checkbox. Enabling this feature will turn on field labels noted as question marks. It will also enable a skip navigation link; this will allow your screen reader to navigate to the content pane versus individual tabs.

8. In the **Help On Mouse Over** field, select **Show Help On Mouse Over And Click**.

9. Select the **Preferred Email Format**: **HTML** or **Plain Text**.

10. Click **Save**.
III. Add A Default Shipping Address

1. Click on your Name (top right) > View My Profile.

2. Under User Information and Settings, click Show All...


4. Click the Select Addresses For Profile button on the right.
5. To locate your shipping address, in the Nickname/Address field, enter your building Name, and click the Search button.

6. Click the radio button next to the desired address.

7. After you click the radio button, the Edit Selected Address window displays.
8. You may assign the Ship To address an optional Nickname (*Me, Myself, a person’s Name, a specific Office, etc.)*.

9. If this is the shipping address you use most frequently, click the Default checkbox.

10. In the ATTN: field, enter your full Name.

11. In the Dept. field, enter your Department.

12. In the Fl/Rm/St (Floor/Room/Suite) field, enter your Room Number.

13. Click Save.
User Profile

Default Addresses

No addresses defined in profile.

Shipping Addresses

Edit Selected Address

Nickname: Me
Default: 
Current Default Address: 
Attn: Jewell S. Barlow
Contact Line 2: Ohio University
Dept: PPMO
Fl/Rm/Sta: 2nd Floor
Address Line 1: 9 Factory St
Address Line 2: Facilities & Auxiliaries Bldg
City: Athens
State: OH
Zip Code: 45701
Country: United States

Save

Questions? Call 597-6446 or email procurement@ohio.edu
The *Nickname* you specified is displayed under *Shipping Addresses* (left side of the window).

![Default Addresses](image)

**NOTE:** You may add multiple *Ship To* addresses to your profile by repeating the above steps.

1. For the *shipping address* used most often, you may make it the *default address*. Under *Shipping Addresses* on the left, click to select the address that you would like to make the default.

2. Under *Edit Selected Address* on the right, click the **Default** checkbox. You may only specify one default shipping address.

3. Click **Save**.

**WARNING:** Shipping items purchased with OHIO funds to a home address is a violation of University purchasing guidelines.
IV. Delete A Shipping Address

1. Click on your Name (top right) > View My Profile.

2. Under User Information and Settings, click Show All...


4. Under Shipping Addresses on the left, click to select the address that you would like to delete.

5. Click the Delete Address button on the right.
V. Add A Default Cart Assignee

By specifying the Cart Assignee in your profile, your future requisitions may be assigned to this person for review. For people who Shop exclusively, the Cart Assignee is the person who has been identified as your Requester. Assigning your shopping cart to the Cart Assignee is a one-to-one relationship. Some Requesters and Approvers will not need to assign their cart; they have self-approval authority (specific dollar limits), after that the cart flows through the normal workflow paths. For departments who want two-eyes on every shopping cart/requisition, individuals (Requesters and/or Approvers) must manually assign the cart (click the Assign Cart button) to the appropriate Cart Assignee.

1. Click on your Name (top right) > View My Profile.

2. Under User Information and Settings, click Show All...

4. Click the **Add Assignee** button. A **User Search** window will open.

5. To locate the appropriate **Assignee**, you may search by **Last Name**, **First Name**, **User Name**, **Email**, or **Department**.

6. Enter the person’s **Last Name** and click **Search**.
7. Under the Action column, click Select next to the appropriate Name.
8. This person’s name will now appear under My Cart Assignees. To make it the default Cart Assignee, next to the desired Name, click the Set As Preferred button.

You may add multiple Cart Assignees to your profile. Only one may be Set As Preferred.

VI. Add A Default Account Number (Cost Center)

If you enter specific Account Numbers (Cost Centers) into your profile, you can quickly select them when you create or edit a requisition.

1. Click on your Name (top right) > View My Profile.

2. Under User Information and Settings, click Custom Field And Accounting Code Defaults.
3. Click the **Codes** tab.

![Image of Codes tab](image)

**WARNING:** Do **not** specify a default value for the **Natural Account**.

4. Under the **Edit Values** column, next to **Project/Task**, click the **Edit** button. (**Project/Task** is the second **Edit** button.)

![Image of Edit Values](image)

5. Click **Create New Value** button.

![Image of Create New Value](image)

6. Enter a **Value** or **Description** and click **Search**. Or you may click the **Search** button to access the list of organization values.

7. To add your **Null Project**, in the **Value** field, enter **000000000** (nine zeros) and click **Search**.

---

**Shopper, Requester, and Approver**

User Profile – v 13.3

Questions? Call **597-6446** or email **procurement@ohio.edu**
8. To change the number of **Results Per Page**, click the down-arrow and select the desired number.

9. Click the **checkbox** next to the desired **Value/s** and click the **Add Values** button at the bottom of the window.

10. To search for multiple values, you may enter part of an account number and the search will display every account number that begins with the alphanumeric code you entered.

11. Once the results display, click the **checkbox** next to the desired **Value/s** and click the **Add Values** button.
12. To set a **default** cost center, click the **Value** or **Description** in the window on the left.

13. In the **Edit Existing Value** window on the right, click the **Default** checkbox and click **Save**.
VII. Remove An Account Number

1. To remove an account number from your profile, in the window on the left, click the account number that you would like to remove.

2. In the *Edit Existing Value* window on the right, click **Remove**.

3. Click the **Close** button.

VIII. Add A Null Project Account Number (Cost Center)

1. Click on your **Name** (top right) > **View My Profile**.

2. Under **User Information and Settings**, click **Custom Field And Accounting Code Defaults**.
3. Click the Codes tab.

![Code Table]

**WARNING:** Do not specify a default value for the **Natural Account** value.

4. Under the **Edit Values** column, click the **Edit** button next to **Project /Task**. (Project/Task is the second **Edit** button.)

![Code Table]

5. Click the **Create New Value** button.

![Create New Value]

6. To add your **Null Project**, in the **Value** field, enter **000000000** (nine zeros) and click **Search**.

**Shopper, Requester, and Approver**
User Profile – v 13.3
Questions? Call 597-6446 or email procurement@ohio.edu
7. After the *Null Project* displays, click the checkbox next to it and click the *Add Values* button at the bottom of the window. The *Value* will be added to the window on the left.

8. If you want to specify the *Null Project* as the *default*, click `000000000/Null Project` in the window on the left. In the *Edit Existing Value* window on the right, click the *Default* checkbox and click *Save*. **Specifying a default cost center is not mandatory.**
9. Click the Close button.

**WARNING:** If you make your Null Project the default cost center in your profile, you must also specify a default Fund Type–Fund–Org to accompany the Null Project.

10. To add a Fund Type–Fund–Org to your Null Project, click the Codes tab.
11. Click the **Edit** button next to **Fund Type–Fund–Org**. (*Fund Type–Fund–Org* is the third *Edit* button.)

![Image of Table: Custom Field Name, Default Value, Description, Edit Values]

12. In the *Project/Task* field, verify 0000000000 is displayed. If you would like to select a different Project/Task that you already entered into your profile, click the *Project/Task* down-arrow and select the desired *Project/Task* value.

![Image of Table: Custom Field Name, Edit Values]

13. Click the **Create New Value** button.

![Image of Table: Value, Description]
14. In the Value field, enter the Fund Type–Fund–Org that corresponds with your Null Project and click Search.

15. Click the checkbox next to the desired Fund Type–Fund–Org value and click the Add Values button at the bottom of the window. The value will be added to the window on the left.

16. To set the Fund Type–Fund–Org number (that corresponds with your default Null Project) as the default, click the Fund Type–Fund–Org in the window on the left. In the Edit Existing Value window on the right, click the Default checkbox and click Save.

17. Click the Close button.
IX. Add An Account Number Combination As A Code Favorite (Account Split)

If you want to add an account number to your profile, see “Add A Default Account Number (Cost Center)” in this document. Accounting Code Favorites allow you to create and save combinations of account numbers (account split) that you use frequently. If you save these frequently used combinations in your profile, you may select them when you create/edit your requisition. You may create many code favorites.

1. Click on your Name (top right) > View My Profile.

2. Under User Information and Settings, click Custom Field And Accounting Code Defaults.

3. Click the Code Favorites tab.
4. Click the **Add** button to setup a **combination** (split pay) of account numbers to be used during checkout.

5. In the **Accounting Codes** window, enter a recognizable **Nickname** for your account split. If you would like to set this **Code Favorite** as the default in your **profile**, click the **Default** checkbox.

6. Click the **Add Split** link on the right side of the window. The window will expand and a second row will display; the second row is a duplicate of the first row.
7. You must select the appropriate account numbers (in each row) for the split. If you already setup Codes (account numbers) in your profile, click Select From Profile Values and click the down-arrow to select the desired account number from your profile.

8. If you selected Select From All Values, click the Select link next to the desired value/description.

9. Verify the appropriate account number is specified in each row.

10. Scroll to the right and select % of Price or % of Quantity as the method for splitting the expense.
11. Enter a numeric value for the split. If you would like to split the amount evenly between two *cost centers*, choose *% of Price* and enter "50" into both account fields.

You may add as many splits as necessary to split the expense between multiple accounts.

12. Click the **Recalculate/Validate Values** link to verify the sum of the percentage values is 100%. If not, you will receive an error message.

If the sum of the percentage values does not equal 100%, you will receive an error message.

13. Click **Save**.

14. After saving your *Code Favorite*, the **Edit** and **Delete** buttons display on the right. To modify your *Code Favorite*, click to select the *Code Favorite* that you would like to modify, and click the **Edit** button. Make the necessary revisions and click **Save**.
15. To remove a Code Favorite, click to select the Code Favorite that you would like to delete, and click the Delete button. To confirm your selection, click OK.

![Confirmation dialog](image)

---

**X. Approve Directly From Email: Setup An Email Approval Code (For Approvers Only)**

If you are an Approver in BobcatBUY, you may take action directly from the auto-email sent to you by the system. 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.*

A personal *Email Approval Code* is required to ensure the authorized *Approver* is taking action.

3. 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.

**User’s Name, Phone Number, Email, etc.**

The minimum value for your personal approval code is four (4) characters.

4. Click **Save**.

Each time that you want to approve directly from email, you must enter your personal *Email Approval Code*. This is case sensitive.
XI. Review Permissions

You may review your authorized permissions. Your permissions are based on your role (Shopper, Requester, or Approver) in the system.

1. Click on your Name (top right) > View My Profile.

2. Under Permission Settings, click Show All...

3. Click to select the Category of permission you would like to view. All values are View Only.

4. To view the description for a specific Permission, hover your mouse over the permission text.

To request additional permissions, contact Finance Customer Care at 597-6446 or email procurement@ohio.edu
XII. View History Of All Profile Changes

Any changes made to your profile are maintained in BobcatBUY’s History.

1. Click on your Name (top right) > View My Profile.

2. Under User Administration and History, click View User’s History.

The History tracks the Date/Time of each change, the User who made the change, the Action, Section, Selection, Field, and the Old/New Value.
XIII. Add A Comment To Profile

You may add a Comment to your profile. This will be saved in BobcatBUY’s History.

1. Click on your Name (top right) > View My Profile.

2. Under User Administration and History, click Add Profile Comment.

3. In the Section field, click the down arrow to specify where to associate your comment.
4. Enter your *comment* text and click *Add Comment*.

All *comments* are saved in BobcatBUY’s *History*.

---

**XIV. Modify Email Preferences And NEW Notifications**

**WARNING:** It is highly recommended that you keep your auto-emails/auto-notifications enabled. You may also review *Notifications* under the *Notifications* feature in BobcatBUY’s *User Menu* (top right).

1. Click on your *Name* (top right) > *View My Profile*.

2. Under *User Information and Settings*, click *Email Preferences*.
The communication you receive is based on your role (Shopper, Requester, or Approver) in the system.

3. You have the ability to enable/disable notifications. When you view your email preferences, the current default will display in each field. If you would like to modify the communication method for a specific task, click the **down arrow next to the appropriate process**, and click **None** (if you do not wish to receive any communication), click **Email** (to enable the auto-email), click **Notification** (to enable the auto-notification), or click **Email & Notification** (to enable both communication methods).

4. To view the description for a specific **Preference**, hover your mouse over the preference text. Make the necessary revisions and click **Save**.

5. To review **Notifications** in BobcatBUY, click **Notifications** in the **User Menu** (top right).
XV. What Is My Role In The System?

You may verify your Role in BobcatBUY.

1. Click on your Name (top right) > View My Profile.


XVI. NEW Menu Search

Menu Search allows you to locate menu items and functions without having to navigate through the interface. This feature is useful for accessing site pages when you are unsure of the location in the navigation menu or the specific name of a menu.

1. Click the Menu Search icon (bottom left).

2. In the Menu Search field, enter the search term that you would like to find.
A list of menus and screens that match your search term will display below the field as you type. This display includes the “breadcrumbs” that show you the navigation path.

3. Click the appropriate menu or screen. You will be taken to this screen.
XVII. NEW Set My Home Page

The Home Page is the page displayed to a user after logging in to BobcatBUY. This new feature introduced in the Phoenix interface allows individual users to set their own Home Page instead of using the Home Page defaulted by the organization. For example, an approver may want to set their own Home Page to the My Approvals menu if that is the main menu they access.

Note: Only menu pages are permitted to be set as a user’s Home Page. If a user attempts to set a lower level page as their Home Page, the system will automatically locate the menu page associated with that item.
1. Navigate to the appropriate menu page that you want as your Home Page.
2. Click on your Name (top right) > Set My Home Page.

3. Click on the Set My Home Page link which allows the user to set the current page as their individualized Home Page. The Set My Home Page window opens with the organization Home Page option and the Current Page option (the menu you selected as your Home Page).

4. Click the Save button. This is now your Home Page that will appear upon login.
5. You can also access the home page by clicking on the Home icon or by using the quick-key combination Alt + 1.
XVIII. **NEW** Managing Page Bookmarks

This feature allows you to create and access bookmarks for commonly used pages. It is useful for accessing pages quickly without having to use the Menu Search or navigate through the site.

1. Navigate to the page in BobcatBUY that you would like to Bookmark. In this example, we will *Bookmark* the *Forms* page. Navigate to the *Forms* page.

2. To access the *Bookmark* menu, click the *Bookmark* (star) icon (top right).

3. Click *Bookmark This Page*. The page will be saved as a bookmark.

4. Now each time you would like to visit the bookmarked page, click the *Bookmark* icon.

5. In your list of bookmarks, under *My Bookmarks*, click the *Bookmark* you would like to access.
6. To remove a bookmark, click the **Bookmark** icon and click **Edit**.

7. Click the **Minus** icon next to the bookmark that you would like to remove.

8. To rearrange the list of bookmarks, click the **Bookmark** icon and click **Edit**.

9. Click and drag the (three lines) icon to reposition its order in the list.