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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.

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**Terms and Conditions**

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 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 activities 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.

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

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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. Notification Of A Pending Request For Approval

As a Requester, you are tasked with reviewing and approving all requests for purchases from those in your approval chain. If the Shopper did not edit the requisition, you may have to add/update information such as Ship To address, Cost Center, split items between Cost Centers, Natural Account numbers, Comments, and Add Internal/External Notes and Attachments.

The Requester will be notified that they have a Cart assigned to them.
1. When a Shopper submits a request for approval, also known as Assigning The Cart, an email is automatically sent to the Requester notifying you of the pending requisition.
2. The Requester will be notified via the Notifications link in the top banner. Click on the Notifications link. Scroll down and click on the specific notification. The document will open to view but you must click on the Action Items link in order to process the Shopping Cart.

III. Basic Tasks Of A Requester To Process A Shopping Cart

The basic task of a Requester is to review, verify, and correct the purchase request. You may also return the requisition to the Shopper for corrections. For requisitions ≤ $1499.99 you will also be the only Approver on the requisition unless you choose to Assign Cart to an Approver. This is not the common method, but it is available in case you need the Approver to verify something questionable that s/he would not otherwise receive in the Approval Workflow due to the limit being ≤$1499.99.

Once you are ready to review the Shopping Cart/Requisition, you may want to update quantities, remove items from the shopping cart, or delete the shopping cart, etc. You may also want to edit cost centers, split expenses to multiple cost centers, edit shipping address, or edit natural accounts. (See Cart & Assign for instructions on editing the requisition.)

1. Click on the Action Items link in the top banner.
2. Click Carts Assigned To Me.
3. Start processing the Shopping Carts assigned to you, located under the **Drafts Assigned To Me** section. Click on the **Shopping Cart Name** to open. The Shopping Cart Summary screen will open.

![Shopping Cart Summary Screen](image)

4. Review and/or edit any information in the Shopping Cart Summary screen.

![Shopping Cart Details](image)
5. Return the cart, if necessary. Ask the Shopper to make specific changes. The Return Cart button is located on the Shopping Cart Summary Screen. You may need to view the Requisition first to determine if you want to Return The Cart to the Shopper.

**NOTE:** If you click Edit Requisition button to review the requisition and then decide to return the shopping cart back to the Shopper you can either:

- Click the Back button on Internet Explorer and it will bring you back to the Shopping Cart Summary screen OR
- Click Shop > hover over My Carts and Orders > View Draft Shopping Carts > Click on the Shopping Cart Name link > Click the Return Cart button.

6. Click the Edit Requisition button. The Requisition Summary view is displayed.

When reviewing the requisition there are edit buttons in each section that you may use to edit that particular section. You will click on each tab to review each section of the requisition. By default, the requisition opens to the Requisition>Summary tab open

**Verify the following fields:**

7. Review the items or services to be purchased.
8. Remove items from the cart, if necessary.
9. Move items to another cart, if necessary.

10. Add items to the cart if necessary. Click the Home icon located in the Main Menu Banner to the left of the screen. Begin shopping and adding items to the cart.

11. Click the General tab. You can edit the Cart Name in this section
12. Click the **Shipping** tab. Review and/or edit addresses entered at the header level and/or at each line level.

13. Click the **Billing** tab (only at Fiscal Year-end when prompted by Procure To Pay dept.) to be sure the expense is charged to the appropriate Fiscal Year.

14. Click the **Cost Center** tab. Review and/or edit cost center/s charged including PROJECT_TASK and FUNDTYPE_FUND_ORG at the header level and/or at each line level.
   You may **Add A Split**, in Header and/or Line Item Details, if necessary.

15. Click the **Natural Account** tab. Review and/or edit natural accounts entered at the header level and/or at each line level.

16. If a number (#) is displayed in the **Comments** tab, click the **Comments** tab to review the comments or **add a comment of your own** to help process the requisition.

17. If a number (#) is displayed in the **Attachments** tab, click the **Attachments** tab to review the attached document. Click on the **Attachment** to open it.

18. Click the **Internal Notes and Attachments** to view any internal notes and/or attachments.

19. Click on **External Notes and Attachments** to view external notes and/or attachments.

20. Add requisition items **To Favorites** if interested in having the same products available for your own purchases.

21. Add items from the current cart to A Draft Cart or Pending Requisition/PO, only if you, the **Requester**, want to purchase the same item/s in the future.

22. Click the **History** tab to view the history of the **Requisition** up to this point in the processing.

**IMPORTANT:** Once the requisition has been submitted by the **Requester** the requisition will enter the workflow. The first step of the workflow is the Funds Available Verification. The system looks at the Oracle Financial Management system to verify if there are funds available to pay for the expense. If there is not enough funds to pay for the expenditures a message will be displayed in the history. The requisition will not be stopped, the message is there for the **Requester** and **Approver** to review if this may be a determining factor for its’ approval.

This message would be loaded once the requisition has gone through the workflow to check if there was Funds Available at that time.

23. **View Approvals:** Click on the **View Approvals** tab to view the **Approval Workflow Process** the requisition will go through as soon as the **Requester** clicks the **Submit Requisition** button. At that time the **Requisition** enters Workflow. The **Shopper, Requester, or Approver** may open the **Requisition** and select the **View Approvals** tab. (See the Approval Workflow Overview and The Requisition Approval Process in Cart & Assign Long Document. The entire Requisition, Purchase Order, and Invoice Approval Workflow Process is detailed.)
24. Click the **Submit Requisition** button. The requisition will be submitted into workflow at this time.
   a. If the requisition is ≤ $1499.99 it will be submitted into *Workflow* but skip the *Approver 1* step of the Cost Center and move onto any other approval folders in that particular workflow. If the requisition is ≤ $5000 it will be submitted into *Workflow* but skip the *Approver 2* of the Cost Center and move onto any other approval folders in that particular workflow.
   b. If the requisition is > $1499.99 it will be submitted into *Workflow* and will flow to the *Approver 1* assigned to the particular cost center/s expensed on the requisition.
   c. If the requisition is > $4999.99 it will be submitted into *Workflow* and will flow to the *Approver 2*, or Budget Unit Manager, assigned to the particular cost center/s expensed on the requisition.

25. **Assign Cart:** If the *Requester* would like *Approver 1* to see a requisition < $1499.99, (or *Approver 2* to see a requisition < $5000) that would not automatically flow to the *Approver*’s folder based on the dollar limit,
   a. The *Requester* may click the **Assign Cart** button to assign the requisition to the *Approver*.
   b. The *Approver* processes the Cart just as a *Requester* processes a Cart assigned to her/him.
   c. The *Approver* verifies the cart (follow steps above) and click **Submit Requisition** button.
   d. The requisition would enter any other workflow folders in that particular workflow.

IV. **Assigned Cart Reminder Notification**

An email reminder will be sent to shopping cart assignees. Usually this is a *Requester* but sometimes it may be an *Approver*, if the *Requester* chooses to **Assign A Cart** directly to an *Approver*.

1. Emails will be sent at regularly scheduled intervals as a reminder there are carts that have not been processed and require attention.
2. The *Requester* will receive an initial reminder email 4 days after the draft cart has been originally assigned.
3. A follow-up email reminder will be sent to the *Requester* every 2 days after the initial reminder email up until the *Requester* processes the shopping cart by submitting the requisition. This will notify the *Shopper* that the *Requester* still has not processed their cart and they may contact the *Requester* to inquire.
Assigned Shopping Carts Requiring Attention

Dear Requester1 Requester1,

Users have assigned shopping carts to you that you have not processed. The list of pending shopping carts is listed below:

### Assigned on 10/3/2013

<table>
<thead>
<tr>
<th>Cart Number</th>
<th>Shopping Cart Name</th>
<th>Vendor Name(s)</th>
<th>Cart Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1040397</td>
<td>Monitors for New Lab in HRTC for: Trainer1 Shopper1</td>
<td>VWR International, Spectrum Chemicals &amp; Laboratory Products</td>
<td>1,667.30 USD</td>
</tr>
<tr>
<td>1040366</td>
<td>New Ipad for student Academic Advancement Center for: Trainer1 Shopper1</td>
<td>CDWG</td>
<td>1,298.00 USD</td>
</tr>
</tbody>
</table>

Please process as soon as possible.

Questions? Call 597-6446 or email procurement@ohio.edu
V. **Edit Requisition** *(See Cart & Assign Document for detailed instructions)*

*Shop > hover over My Carts and Orders > View Draft Shopping Carts > Drafts Assigned To Me >* click the Shopping Cart Name > Click Edit Requisition

If the shopping cart has been assigned to you from another *Shopper* you must verify all the information is correct in the assigned requisition. You can modify the values – Header or Line Item – as needed. This allows you to ensure the header information and/or each line item has the correct information associated with it. Fields that you will want to verify are listed above in the **Basic Tasks Of A Requester To Process A Shopping Cart.**

1. From within the **Shopping Cart**, select the **Edit Requisition** button.

The **Summary – Draft Requisition** page details all information that must be updated. This information is highlighted by the **Red Exclamation Points** at the top of the page in the Task Bar.

⚠️ Each **Exclamation Point** references a specific field in the requisition that must be edited. In the example below, the **Natural Account** field must be populated. Once you edit all of the required fields, you are ready to **Submit The Requisition.**

**NOTE:** The **Submit Requisition** button is not fully visible or functional until all tasks in the **Task Bar** are completed by displaying a green circle with a white check mark in it. The *Shopper* may assign a cart to a *Requester* with incomplete task bar information, a *Requester* may also assign a cart to an *Approver* with incomplete task bar information, but a *Requester or Approver* may never submit the requisition until all **Task Bar** information is complete. The system will not make the **Submit Requisition** button functional until all **Task Bar** information is complete.

2. Edit the **Requisition.** After you have reviewed it you may continue to process it. You may either **Return the Cart, Submit the Requisition**, or **Assign The Cart.**

In the next example, all tasks in the Task Bar are now complete and now the *Requester* may process/submit the **Requisition.**
VI. Submit A Requisition

Shop > hover over My Carts and Orders > View Draft Shopping Carts > Drafts Assigned To Me > click the Shopping Cart Name > Click Edit Requisition

Following your complete review of the requisition, all fields in the workflow process will display a green checkmark. The requisition is now ready for submission.

1. Click the Submit Requisition button.

A Requisition Information page opens. The following will display:

- Requisition Number (The Requisition has a view link and is now searchable)
- Requisition Status (The Requisition has just entered Workflow and is in a Pending Status)
- Cart Name (The Name on the Cart either assigned by the system or entered by the Shopper)
- Requisition Date
- Requisition Total
- Number of Line Items

You may also take advantage of the links at the bottom of the notification screen to move on to other actions in BobcatBUY.

An email is automatically generated to the Shopper and the Requester notifying them the Requisition has been submitted for processing.
Requisition Information

Congratulations! You have successfully submitted your request. If you need to view or print a copy, click Quick View or view its status on the Approvals Tab.

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

- Requisition number: 605688
- View
- Requisition status: Pending
- Cart name: lab supplies
- Requisition date: 7/19/2011
- Requisition total: 102.70 USD
- Number of line items: 2

What would you like to do next? Here are links to some common actions:
- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

NOTE: It is recommended that you keep your email notifications enabled. No notification methods, other than email, are available.

After the shopping cart is submitted, you may still access the requisition and complete the following actions: (See Cart & Assign for instructions.)

- Add A Comment
- Add Notes to History
- Withdraw Entire Requisition (only until the PO is created)
- Copy To New Cart
VII. Assign A Cart (Requisition ≤ $1499.99) To An Approver

After you review a shopping cart, you will most often click the Submit Requisition button to submit the shopping cart. If the requisition is > $1499.99 it will automatically route to the Approver/s authorized to approve requisitions for that specific cost center. As a reminder, carts under ≤ $1499.99 will be processed only by you, the Requester, unless you specifically want the Approver to review it before it is submitted. If you want the Approver to review the particular requisition, you may Assign the Cart to the Approver. The Approver will then review and Submit The Cart in place of you.

To Assign The Shopping Cart/Requisition:
1. To access the Shopping Cart; Shop>My Carts and Orders>View Draft Shopping Carts
2. Under Drafts Assigned To Me, click the Shopping Cart Name. The shopping cart will open.
   You will probably click on the Edit Requisition button to review the shopping cart and at some point determine that you want the Approver on the cost center to review and submit the Cart instead of you making the decision.
3. In the active shopping cart, click the Assign Cart button at the top right.

4. The Assign Cart window opens. The user has three ways to select an assignee; choose the default assignee (if setup in User Profile), Select from the Profile Values (if multiple assignees were setup in User Profile), or Search for an Assignee from all assignees listed in the BobcatBUY system. (Refer to Assign A Cart in the Shopping and Cart long document).

You will receive a message that your cart was successfully assigned. A confirmation page will appear summarizing the cart. Summary: Notes associated with the request, Requisition Number, Total, and Line Items. An email is sent to the Shopper, confirming submission and providing the Requisition Number. An email is also sent to the Assignee, notifying them of a pending requisition for review.
VIII. Where Is The Requisition In The Approval Process?

There are three different approval workflow processes in Bobcat BUY:

- Requisition Approval Workflow
- Purchase Order Approval Workflow
- Invoice Approval Workflow

The workflow process begins when the cart is submitted and flows through all the steps until the Purchase Order is sent to the supplier and the supplier receives payment for the received goods or services. If the requisition is a Direct Payment, the requisition becomes a Purchase Order to enable payment via the Financial Management System but the Purchase Order is never sent to the supplier (since the product or service is most always already received).

1. A cart is created, submitted, reviewed, and approved. Upon completion of the Requisition Approval Process, a purchase order number will be generated (Requisition Approval Workflow).
2. Upon completion of the Purchase Order Approval Process, the purchase order is distributed to the supplier and the purchase order information is exported to Oracle FMS to create the Encumbrance (Purchase Order Approval Workflow).
3. The item/service is received.
4. The Invoice is received by Accounts Payable staff and is entered into the system.
5. Upon completion of the Invoice Approval Process, the Invoice is approved for payment.
6. Notification is sent to Oracle to verify it is okay to pay the supplier (Invoice Approval Workflow).
7. The entire Requisition, Purchase Order, or Invoice Approval Workflow Process is detailed.

There are some instances when a purchase order will not be created. The following forms do not produce a purchase order; Request To Add New Supplier, Close PO Request and Change Order Request.

However, you may still view the requisition approval workflow for those three forms.

As mentioned above, there is a purchase order created for a Direct Payment form but it is not sent to the supplier.

The entire Requisition, Purchase Order, or Invoice Approval Workflow Process is detailed. Within each approval process there are folders that include an approval workflow tab (View Approvers tab in the Requisition, PO Approvals tab in the Purchase Order, and Approvals tab in the Invoice).
If you have not been notified of a requisition being turned into a purchase order or you realize the request is being delayed, you may view the approval process to determine where it has stopped in the workflow process.

If a step has a green checkmark and the word **Approved**, this step in the process has been approved and you move onto the next step to view the status. If you realize the request is being delayed (**will display Active**), you can select the **View Approvers** link in the “**Current step**” (the step in which the requisition is waiting to obtain approval). This will provide contact information for the **Approvers** for this particular workflow step.

You may also view the approver’s **Name, Email, and Phone Number** for any given approval workflow step. If the requisition is stopped at a particular workflow step, you may contact the approver to inquire about the approval status.

For example, by clicking on the link in the Workflow Step Approvers (Final Review) folder, the system displays the staff that may be contacted to approve this step in the requisition workflow.

There are a number of workflow steps that a requisition may or may not flow through based on its’ unique identifiers, such as: **Commodity Code**, **Cost Center (account number)**, **Dollar Amount**, **Natural Account**, and **Form Type**, etc. Please find additional details regarding the three different workflow processes as well as examples at the end of this section.

For Details on each workflow refer to the **The Requisition Approval Process, The Purchase Order Approval Process, and The Invoice Approval Process** in the Cart and Assign Document.
IX. Assign A Substitute Requester

You may assign a Substitute for yourself if you are going to be away for any period of time. By selecting a substitute, any carts assigned to you will be automatically redirected to your substitute's draft carts. The original Shopper will be shown a warning message indicating the cart is being redirected to a new Requester.

1. To Assign a Substitute, click on Shop > hover over My Carts and Orders > View Draft Shopping Carts.
2. Click the Assign Substitute link, located at the top left of the page.
3. A User Search window opens. You may search for the appropriate Substitute by Last Name, First Name, User Name, Email, or Department.
4. Enter your search criteria and click the Search button.
5. From the search results, click the Select link next to the appropriate Substitute.
6. The new Requester’s name will appear at the top of the page, confirming your selection.
NOTE: All subsequent carts will be assigned to the Substitute. Any carts currently assigned to you must be acted on by YOU. Those carts assigned to you will remain in your task list under Drafts Assigned To Me.

When a Shopper assigns their cart to you, the Shopper will receive an email message in the notification window that the cart has been assigned to the substitute. It will display the substitute’s name as well. In the example below the substitute is Jewell Barlow.

X. End Substitution

When you return back to work and you are ready to begin reviewing assigned carts again,
1. To Assign a Substitute, click on Shop > hover over My Carts and Orders > View Draft Shopping Carts.
2. To End Substitution, click the End Substitution link, located at the top left of the page.

3. The screen will refresh and the Assign Substitute link will appear again. Carts will no longer be redirected to your Substitute.
XI. Return A Shopping Cart

The Requester may decide to Return a Cart back to the Shopper for several reasons. Occasionally a Requester might have a cart assigned to them by mistake. Additionally, the Requester may want the Shopper to provide additional information or select a different account code. Instead of requiring the Shopper to Unassign the Cart, the Requester can now return the cart back to the Shopper. This allows the Shopper to make any corrections to the cart or to assign it to the appropriate person.

The Requester can only return the cart back to the Shopper; they cannot select an alternate user. Upon returning the cart, the Requester will be presented with a window that will allow them to enter a reason why it is being returned. This will be recorded in the cart history and also in an email to the Shopper provided that the Shopper has the email preference enabled.

To access the shopping cart,
1. To Assign a Substitute, click on Shop > hover over My Carts and Orders > View Draft Shopping Carts.
2. Under the Drafts Assigned To Me section, click on the Shopping Cart Name link to open the shopping cart. The Shopping Cart Summary window opens.
3. To return the shopping cart back to the Shopper, click the Return Cart button.

**NOTE:** If you click Edit Requisition button to review the requisition and then decide to return the shopping cart back to the Shopper you can either:

- Click the Back button on Internet Explorer and it will bring you back to the Shopping Cart Summary screen OR
- Click Shop > hover over My Carts and Orders > View Draft Shopping Carts > Click on the Shopping Cart Name link > Click the Return Cart button.

4. A Return Cart window is displayed.
5. Enter your Note text. The name of the Shopper will be prefilled in the Return Cart To: field.
6. Click the Return button.
7. A record of the returned shopping cart is displayed in the History of the requisition.

8. The Shopper will receive an email indicating the shopping cart was returned.

9. This is the Shopper’s view when they receive a returned cart from the Requester.

10. The Shopper may access the returned cart by clicking on Shop > hover over My Carts and Orders > View Draft Shopping Carts > under My Drafts.

11. The Shopping Cart Name displays the Returned Cart symbol.

12. The Shopper may access the shopping cart. Click the Shopping Cart Name, click the Edit Requisition button, make any necessary changes, and click Assign Cart.
XII. All Actions That May Occur To A Requisition Returned By The Approver

Following review, an Approver may decide to return a requisition to the Requester because it requires additional information or changes.

If a requisition gets returned by the approver, the requisition goes back to the Requester in a section labeled My Returned Requisitions. At the same time the Shopper will see the requisition back in Shop Menu icon > hover over My Carts and Orders > View Draft Shopping Carts > My Drafts Assigned to Others. Both Shopper and Requester will also receive an email. Depending on the reason why the cart was returned one of three things may happen:

1. The Shopper may Unassign the cart/requisition, edit the cart, and reassign the cart.

2. The Requester may edit the cart by contacting the shopper for vital information (see instructions for this later in this document), then Submit The Requisition again, or

3. The Requester may Withdraw the returned requisition.

XIII. A Requester Withdraws The Requisition (Returned By The Approver)

These next instructions are what the Requester would do in order to Withdraw the requisition. To access the returned requisition, in the Top Tool Bar,

1. Click the Shop Menu icon > hover over My Carts and Orders > View Draft Shopping Carts > My Returned Requisitions section.

**WARNING:** Once a requisition is withdrawn, it cannot be reinstated.

2. Click the Withdraw button.
3. Once the requisition is withdrawn by the Requester, anyone may access the withdrawn requisition by clicking on the Orders & Documents Menu icon > hover over Document Search > Search Documents, then select Requisition and enter the Requisition Number in the search field.

4. The Withdrawn Requisition displays a Red Arrow icon to the left of the requisition number which indicates it is a withdrawn requisition.

5. Click the Requisition Number to access the withdrawn requisition.

XIV. Overview Of Actions To Perform On A Withdrawn Requisition

There are four actions the Shopper or Requester may perform on a withdrawn requisition:

1. Add Comments And Attachments (see instructions in the following sections)
2. View Document Comments (see instructions in the following sections)
3. Copy To New Cart (see instructions in the following sections)
4. Add Notes To History (see instructions in the following sections)
5. Any user may access any requisition in the system. If you know the requisition number you may use the Quick Search feature at the top, right-hand side of the screen. Click on the magnifying glass

You may use the default document type All, then press the Tab key, enter the Requisition Number that you would like to search for, and click the magnifying glass at the end of that field, or push the Enter key on the keyboard.
6. To view the History of the Withdrawal, click on the Requisition number, if it is not already open, then click the History tab. View all of the history for this requisition.

![Requisition History Image]

**XV. Add A Comment And Attachment**

Comments and Attachments may be added by the Shopper, Requester, and Approver at the time each role has access to the document. Comments and Attachments can go back and forth between the Requisitioner and the Approver during the approval process. Once the cart becomes a requisition, the Comments tab has the capability of emailing the comment to other BobcatBUY users.

This is the process when accessing the Requisition in My Drafts (Shopper) or Drafts Assigned To Me (Requester).

1. To Add A Comment; Click on the Shopping Cart name.
2. Click the Edit Requisition button.
3. Click the Comments tab.
4. Click the Add Comment button. Again, this is the Add Comment box and Process for Only the Shopper and Requester when accessing a requisition before it has been submitted.

5. Add your comments in the text box.
6. To attach a file or a link, click the Browse button to navigate to where your file is saved.
7. Double-click the file that you would like to attach.
8. To add a Link/URL to the comments section, click on the drop-down arrow in the Attachment Type field, click on Link/URL, enter the URL Name and the actual URL link in the appropriate fields.
9. Click Add Comment.

**WARNING:** Once you enter a comment there is no way to edit/remove the comment after you have clicked the Add Comment button.

10. The Comment appears in the Comments detail section. Any attachments are also displayed.
11. For *Shoppers* accessing a requisition (instead of a draft), *Requesters* accessing a requisition, or an *Approver* adding comments – The *Comment* box has added features:

a. **Shopper/Requesters:** When accessing a requisition after it has been submitted via Quick Search link (see instructions above), click on the requisition number to display.

b. **Click on the Comments tab.**
c. **Click Add Comment button.**
d. **To send an email notification indicating that a comment has been added,**
   - Click the checkbox next to the user’s name.
   - To notify a different/additional person,
     a. Click **Add Email Recipient.**
     b. Enter the search criteria for the user and click the **Search** button.
     c. Click the **Select** link next to the appropriate user.
     d. Repeat to add additional users.
   
   **Note:** The added email recipient must be an authorized BobcatBUY user.

e. **Add your comment in the text box.**
f. **To attach a file or a link,**
   a. Click the **Browse** button to navigate to where your file is saved.
   b. **Double-click** the file that you would like to attach.

g. **To add a Link/URL to the comments section,** click on the drop-down arrow in the *Attachment Type* field, click on **Link/URL,** enter the URL Name and the actual URL link in the appropriate fields.

h. **Click Add Comment.**
The following information displays regarding the added comment.

12. An email is sent to all of the users specified to receive the notification.
13. To view the Comment in History,
   - Open the requisition.
   - When the Requisition opens click the History tab. You will be able to view all of the History for this requisition.
   - The following is displayed: Date/Time, Action, and the Comment/Note entered.
   - To view the entire note, click More.
XVI. View Document Comments

When a user opens a purchase requisition, a purchase order, invoice, or receipt, an audit trail is available through the History tab and comments are available for viewing through the Comments tab. Reviewing the Comments and History for an order is a common way to track status and view an audit trail of events. The number of comments on a document is shown in (#) on the Comments tab. In addition, comments that are added during the various actions listed below will also display on the comments tab.

- Approve (when approving on behalf of another approver)
- Reject entire PR (within workflow)
- Reject Line Item(s)
- Draft Cart Assignment
- Assign
- Unassign
- Forward
- Place on Hold
- Add note to history
- Expedite through workflow steps
- Bypass a workflow step
- Withdraw entire PR
- Withdraw line(s) on PR
- Return PR

Users can select to view the comments only for the document that is open (the Req, PO, etc.) or to view information for all associated document types (requisition, purchase order, invoice, and receipt). This provides the ability to see all related comments on a single comments tab.

1. Click on the Comments tab to view comments. By default only the comments for the open document are displayed.
2. Use the Filter to view any associated documents. Click the Show Comments For drop-down menu to view comments for the other associated documents. You may choose to view comments for one specific document or choose All which will display any comments for all associated documents.
XVII. Copy To New Cart

You may want to *copy* the existing cart to a new cart even if the requisition has already been turned into a purchase order. This may be an order that you want to repeat. You may also want to *copy* a returned or withdrawn requisition to a new *shopping cart*.

1. Access the requisition.
2. In the *Available Actions* field in the top right, click on the drop-down arrow, select *Copy To New Cart*, and click the *Go* button.

A new *Shopping Cart* summary screen will open containing the identical items displayed in the previous cart. The shopping cart is ready to edit and then assign.

3. Update the *Cart Name* on the Shopping Cart summary page.
4. Click the *Save* button.
5. Click the *Edit Requisition* button. Edit the Requisition.

6. **Submit Requisition.**

**WARNING:** *Comments will not be copied over to the new cart.* Attachments will be copied over to the new cart. The system will copy items from a punch-out catalog. However, the *Punch-out Suppliers* do not support this feature. The system will display an error message. You must remove the punch-out catalog items in order to proceed. If all the items in your cart are from a punch-out catalog you should not copy the cart. Start a new cart and shop via the punch-out catalog.

![Almost ready to go! The list below needs to be addressed before the cart can be submitted.](image)
XVIII. Add Notes To History

You may add a Note to the history of the requisition. This only applies to Requisitions that have already been submitted into workflow.

If you are the Shopper,
- Click the Orders & Documents Menu icon > hover over Document Search > Search Documents > My Requisitions
- Click the Requisition Number to open it.

For other users, to open the requisition;
- Click on the Orders & Documents Menu icon>Search Documents,
- Enter the Requisition Number and click Go.

1. When your requisition displays, in the Available Actions drop-down list, select Add Notes To History, and click Go.

2. Enter your Note and click the Attach button.

3. To view the History (Note), open the Requisition and click the History tab. You will be able to view all of the History for this requisition.

   The following is displayed: Date/Time, User, Steps, Action, Field Name, and the Note entered. If the note is long, click more, to view the entire note.
XIX. View Others Draft Carts

You may view other BobcatBUY users draft carts to help answer questions or assist them in processing their own Draft Cart. The definition of a Draft Cart in this context is any cart that has not been submitted. So, the search may display carts that are in shoppers, requesters, or approvers My Draft Carts section or it may display carts that are in shoppers or requesters My Drafts Assigned To Others section. The view displays the Requisition Summary. It does not display comments or attachments. It does not display details on Shipping, Cost Center, or Natural Account Code values overridden at the line level. However, it does display the message if a particular value has been overridden (see the example draft requisition below).

1. Click on the Shop icon located in the Main Menu Banner to the left of the screen. Hover over Admin > View Draft Carts From Other Users.
2. Or you may view the items in your cart from the My Cart screen or click on the View My Cart button to open the Active Shopping Cart Summary screen.

3. Enter search criteria in any field to find a particular Draft Cart. Click the Search button.

4. Click on the Shopping Cart Name to open and view the Draft Requisition.

5. The summary view of the Draft Requisition is displayed.
### Requester

**Summary - 737740 - Draft Requisition**

<table>
<thead>
<tr>
<th>General</th>
<th>Shipping</th>
<th>Billing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cart Name:</td>
<td>2012-09-13 trainshop 01</td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>Priority:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepared by:</td>
<td>Trainshop Shrinker</td>
<td></td>
</tr>
<tr>
<td>Prepared for:</td>
<td>Trainshop</td>
<td></td>
</tr>
<tr>
<td>Prevailing Wage:</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Ship To:</td>
<td>Attn: Gina Rider</td>
<td>Ohio University \P.O. Box 1165 \597-6446</td>
</tr>
<tr>
<td>Delivery Options:</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>PO Via:</td>
<td>Best Carrier/Best Way</td>
<td></td>
</tr>
</tbody>
</table>

**Cost Center**

- **PROJECT_TASK**: FN110003
- **FUND_TYPE**: 30-5300-2010
- **FUND**: 130
- **ORG**: T900
- **Accounting Codes values vary by line**

**Internal Notes and Attachments**
- Add line name here (51k)
- Research Lab Supply... (12k)
- GRA Exp. Date (no value)

**External Notes and Attachments**
- Note to all Suppliers
- Attachments for all suppliers

**Supplier / Line Item Details**

<table>
<thead>
<tr>
<th>Line</th>
<th>Product Description</th>
<th>Contract</th>
<th>PO Number</th>
<th>Unit Price (USD)</th>
<th>Quantity</th>
<th>Ext. Price (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>beakers</td>
<td></td>
<td></td>
<td>$29.00</td>
<td>1</td>
<td>$29.00</td>
</tr>
<tr>
<td></td>
<td>Commodity Code:</td>
<td></td>
<td></td>
<td>Laboratory/Medical Equipment &amp; Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Internal Note:</td>
<td></td>
<td></td>
<td>no note</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Internal Attachments</td>
<td></td>
<td></td>
<td>no note</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>External Note:</td>
<td></td>
<td></td>
<td>no note</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>External Attachments</td>
<td></td>
<td></td>
<td>no note</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Supplier subtotal</td>
<td></td>
<td></td>
<td>25.50 USD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**VWR International**

<table>
<thead>
<tr>
<th>Line</th>
<th>Product Description</th>
<th>Contract</th>
<th>PO Number</th>
<th>Unit Price (USD)</th>
<th>Quantity</th>
<th>Ext. Price (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>GLOVE BAG CLAMP 1PC [ VWR Exclusive ] Glove Bag Clamp</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Manufacturer: ALFA Aesar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Manufacturer: 41590-50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Description:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CATALOG:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>URL: <a href="http://www.vwr.com/catalog/product">http://www.vwr.com/catalog/product</a>...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>UNSPSC:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Supplier subtotal</td>
<td></td>
<td></td>
<td>46.47 USD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Line #1** - Accounting Codes values have been overridden for this line

**Line #2** - In this example, the Ship To values have been overridden but the details of the new Ship To Address is not displayed. The Cost Center has been overridden but the details of the new Cost Center expensed is not displayed.

Questions? Call 597-6446 or email procurement@ohio.edu
XX. View The History (Withdrawals, Comments, And Notes)

You may view the History (Comment, Note, and reason for a Withdrawal). When a user opens a requisition, a purchase order, invoice, or receipt. The History tab contain an audit trail available on each document. Reviewing the History is a common way to track status and view an audit trail of events.

- The Requisition History tab contains information from the creation of the shopping cart including all shopping activity thru all of the Purchase Order activity, thru all of the Invoice activity, and then ending with the Invoice being sent for payment to Oracle Financial system.
- The Purchase Order History tab contains only the history form the creation of the Purchase Order until it is exported to Oracle Financial Management system to record the Purchase Order and record the associated encumbrance.
- The Invoice History tab contains information from the creation of the Invoice until the Invoice is sent to Oracle Financial Management system to pay.

You may select to view the History only for the document that is open (the Req, PO, etc.) or for associated information for all document types (Req, PO, Invoice, and Receipt). This provides the ability to see all related history on a single History tab and saves valuable time toggling to different screens.

You may view the History starting from any document. For the example below we will display viewing the history from the Requisition.

1. If you know the requisition number you may use the Quick Search feature at the top, right-hand side of the screen. Click on the magnifying glass.

You may use the default document type All, then press the Tab key, enter the Requisition Number that you would like to search for, and click the magnifying glass at the end of that field, or push the Enter key on the keyboard.
2. When the Requisition opens, click the **History** tab.

![History tab in Bobcat BUY](image)

3. By default only the comments/transactions for the *open document* are displayed. Use the filter to view any other associated documents.
   a. Click the **+Click To Filter History** button.

   ![Filter History button](image)

   In the *Filters* window, use one or more of the filters (*Start Date*, *End date*, *Action*, and *Show History For*). You do not have to enter any criteria in the *Start Date*, *End Date*, or *Action* field.

   ![Filters window](image)

   b. **Start date** - Enter the start date for the desired date range for the history search.

   **End date** - Enter the start date for the desired date range for the history search.
c. The *Action* drop-down field has five choices: *Blank*, *Approvals*, *Modification*, *Integration*, and *Miscellaneous*.

![Image of Action drop-down field]

**Blank** - Will result in displaying all actions for the particular document/s.

**Approvals** - Indicates the action taken as part of the approval process.

**Modifications** - Indicates the requisition or purchase order data was modified. See the Field Name for the data element that was modified.

**Integration** - Indicates an action or modification completed as part of an external system integration.

**Miscellaneous** - Indicates a miscellaneous action or modification completed for the requisition or purchase order.

d. The *Show History For* drop-down field has five choices: *All*, *Requisition*, *Purchase Order*, *Invoice*, and *Receipt*. You may choose to view comments for one specific document or choose *All* which will display comments/transactions for all of the associated documents.

**NOTE:** If you choose *All* in the *Show History For* drop-down menu, the *Action* field will disappear.

![Image of Show History For drop-down field]

4. Determine the appropriate choices for one or more of the filters, and click the *Apply* button.
You will be able to view the entire History for either the specific document you have accessed or, if you used the filter, for the specific results based on the combination of filter choices. The History tracks and displays different columns based on your selections.

5. Under the Note column, if there is additional text, click **more** to view the entire Note.

Below is an example of the History display for viewing history for only one document.

When viewing the History for All, a column labeled **Applies To** is added. This column lists the document name to which the specific row of History information applies.
XXI. Quick Search

The *Quick Search* feature allows the user to perform a variety of searches, such as All Documents, Contracts, Documents, Invoice Numbers, Purchase Order Numbers, Receipt Numbers, Requisition Numbers, Supplier Invoice Numbers, Supplier Profiles and/or Help.

1. Use the **Quick Search** feature at the top right-hand side of the screen.
2. Click on the magnifying glass. The Quick Search window is displayed.
3. You may use the default document type **All**, or click the down-arrow and select the desired **Document Type**.

4. Press the **Tab** key, enter the *specific Document Number* that you want (except for All).
5. Click the **Magnifying Glass** at the end of that field, or press the **Enter** key on the keyboard. Your search result will be displayed.
XXII. Process A Returned Requisition (From An Approver)

Following review, an Approver may decide to return a requisition to the Requester because it requires additional information or changes.

If a requisition gets returned by the approver, the requisition goes back to the Requester in a section labeled My Returned Requisitions. At the same time the Shopper will see the requisition back in Shop Menu icon > hover over My Carts and Orders > View Draft Shopping Carts > My Drafts Assigned to Others. Either may access the requisition and make the appropriate changes; this effort should be coordinated between the Shopper and Requester.

The Shopper and Requester will both receive an email indicating the requisition has been returned by the Approver.

If The Shopper Makes the Changes to the Returned Requisition:

1. Click the Shop Menu icon > hover over My Carts and Orders > View Draft Shopping Carts > My Drafts Assigned to Others.
2. Click the Unassign button.
3. Click Edit Requisition, make the revisions, and click the Assign Cart button.

If The Requester Makes the Changes to the Returned Requisition:

1. Click the Shop Menu icon > hover over My Carts and Orders > View Draft Shopping Carts > My Returned Requisitions.
2. Click on the Shopping Cart Name to open it.
3. Click **Edit Requisition**, make the revisions, and click the **Submit Requisition** button.

The *Requisition Information Status* window displays. The requisition number stays the same.

You will receive an email message indicating the requisition has been submitted.

Once the requisition has been submitted the **Approver** will be able to view the resubmitted requisition in the shared approval folder. The **Resubmitted Requisition** icon will also display.
XXIII. A Rejected Requisition (The Entire Requisition Or Certain Line Items)

An entire requisition may be Approved or one or more line items in the requisition may be Rejected. If part of a requisition is rejected (one or more line items), the remaining line items continue in the Approval Workflow Process. If a line item or the entire requisition is Rejected (by an individual or the system), an email is sent to both the Shopper and the Requester notifying them of the rejection. The rejection notice can also be viewed in the History tab. If you are setup to receive email notifications, you will receive an email notification regarding the rejection.

**NOTE: It is recommended that you keep your email notifications enabled.**

The Approver Rejected The Entire Requisition
Following review, an Approver may decide to Reject the entire requisition. If this happens, both the Shopper and the Requester will receive an email indicating the requisition has been rejected. The only actions the shopper may take on a rejected requisition is to Copy To A New Cart, Add Comments, or Add Notes To History.

To access the requisition for additional information regarding the Rejection:

1. To open the requisition;
   - Click on the Orders & Documents Menu icon > hover over Document Search > Search Documents
   - Enter the Requisition Number and click Go.

2. Click on the Requisition Number to open it.

3. When the requisition displays, click the History tab. All Comments and History will display.
4. There are four actions the Shopper/Requester/Approver may perform on a rejected requisition:
   - Add Comments And Attachments (see instructions in the Table of Contents).
   - View Document Comments (see instructions in the Table of Contents).
   - Copy To New Cart (see instructions in the Table of Contents).
   - Add Notes To History (see instructions in the Table of Contents).

The Approver Rejected One Or More Line Items
Following review, an Approver may decide to Reject one or more line items on the requisition. If this happens, the Shopper and the Requester will both receive an email indicating one or more line items on the requisition have been rejected.

The Approver must complete the Approval Process for the other line items remaining on the requisition. Once the approval process is complete, you may access the requisition for information.

1. To access the requisition for additional information, use the Quick Search feature.
2. Click on the Magnifying Glass (top right).
3. You may use the default document type All, then press the Tab key, enter the Requisition Number, and click the Magnifying Glass at the end of that field, or press the Enter key on the keyboard. The Requisition number will display along with all accompanying Purchase Orders.

4. Click on the Requisition Number to open it.
5. Click the requisition Summary tab.

The Status displays Approved (green checkmark) But Line Item Rejected (red x)✔.

6. Scroll down to view the rejected line item. In the Supplier/Line Item Details section, the line item(s) is displayed with a Rejection symbol ✗ next to the line item.

The requisition has completed this approval step and will move on to the next workflow step. For additional information, you may click the View Approvals tab or click the History tab.

**XXIV. Approver Placed The Requisition On Hold**

The Approver may decide to Place A Requisition On Hold. They may need additional information before approving it. You do not need to do anything unless the Approver requests specific information. Placing a requisition on hold does not automatically send an email to the Requester or the Shopper. If you wonder why your requisition has not been approved, check its status. No email is sent when a requisition is placed on hold, however you may view this information via the View Approvals tab.
1. To access the requisition for additional information regarding the *Hold*; you may use the **Quick Search** feature.

2. Click on the Magnifying Glass (top right).

3. You may use the default document type **All**, then press the **Tab** key, enter the **Requisition Number** that you would like to search for, and click the **Magnifying Glass** at the end of that field, or press the **Enter** key on the keyboard.

4. Click on the **Requisition Number** to open it.

5. Click the **View Approvals** tab to verify its status. If the requisition is on hold you will see “*Hold*” displayed in the **Dept. Acct. Approval** folder. The name of the **Approver** who placed the requisition on hold will also display.

6. Click the **History** tab. The status of the requisition may also be viewed via the **History** tab.