Notification Of A Pending Request For Approval

As a Requester, your task is to review all requests for purchase from those in your approval chain. If the Shopper did not edit the requisition, you may add/update information such as Ship To address, Cost Center (account number), Account Splits between cost centers, and Internal/External Notes and Attachments.

When a Shopper submits a request for approval, also known as Assigning The Cart, you will receive an email message notifying you of the pending requisition. You will also receive a Notification (top right).

1. Click the Action Items link (top right).
2. Click Carts Assigned To Me. All requests pending your review will display.
3. Under Drafts Assigned To Me, click the Shopping Cart Name. The shopping cart will open for your review.

At this point in the review process, you may want to update quantities, remove items from the shopping cart, or delete the shopping cart. (See Cart & Assign for instructions).

Edit Requisition

If the shopping cart was assigned to you from a Shopper, you must verify all the information contained in the requisition is correct. As a result, you must review, verify, and correct (or return the requisition to the Shopper for corrections) the purchase request. For requisitions (shopping cart total) less than $1499.99, you will be the Approver, unless you decide to Assign Cart to the department’s account Approver.

Re requester

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

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

2. Review the items or services that are being requested for purchased.
3. Remove/Move items from the cart, if necessary.
4. Return The Cart, if necessary. Ask the Shopper to make specific revisions.
5. Click the Cost Center tab. Review the account number charged in the Header level. Review any account numbers charged at the Line level. You may Add A Split (account splits between cost centers), if necessary.
6. Click the Shipping tab. Review the address entered in the Header level. Review any addresses entered at the Line level.
7. Click the Billing tab (at the end of the fiscal year ONLY) to verify the expense is charged to the appropriate Fiscal Year.
8. Click the Natural Account tab. Review the natural account in the Header level. Review any natural accounts at the Line level.

**IMPORTANT:** If you require assistance determining the appropriate Natural Account code to use, refer to OHIO’s Natural Account Lookup website: http://portal.finance.ohiou.edu/nalookup/

1. In the Search field, enter a word to describe the item that you are requesting for purchase.
2. Click the Search button.
3. All of the Natural Account codes will display that contain the word that you entered.
4. Review the list and select the most appropriate Natural Account code.

9. If a number (#) is displayed in the Comments tab, click the Comments tab to review the comments.
10. 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.
11. Click the History tab to see if there is a message from Oracle Financial Management System indicating whether or not sufficient funds are available.

**NOTE:** Upon completion of your review of the requisition, all fields in the workflow process will display a green checkmark. The requisition is now ready for submission.
12. Click the Submit Requisition button.

A Requisition Information page opens. The following will display: Requisition Number, Requisition Status, Cart Name, Requisition Date, Requisition Total, and Number of Line Items. An email is automatically sent to the Shopper and Requester notifying them the request has been submitted for processing.
NOTE: It is highly recommended that you keep your User Profile email settings enabled. You will also receive a Notification (top right).

WARNING: If the Submit Requisition button is inactive, this means there are tasks in the Task Bar that require editing. The Shopper may assign a cart to a Requester that is incomplete. A Requester may also assign a cart to an Approver that is incomplete. A Requester or Approver cannot Submit Requisition unless all of the Task Bar tasks are complete. The Submit Requisition button will be inactive, unless all of the Task Bar tasks are complete.

What Happens When I Click Submit Requisition?
- If the requisition total is under $1500, it will go into workflow.
- If the requisition total is over $1499.99, it will automatically route to Approver 1.
- If the requisition total is over $4999.99, it will automatically route to Approver 2 (Budget Unit Manager).

The Assigned Cart Reminder Email Notification
A reminder email message will be sent at regularly scheduled intervals to remind the Requester she has purchase requests to process. Both the Shopper and Requester will receive the initial reminder message 4 days after the cart was originally assigned. A follow-up email reminder will be sent to both every 2 days following the initial reminder until the Requester processes the cart (Submit Requisition). This will alert the Shopper, so you may contact the Requester to inquire.

Assign A Cart (Requisition Under $1500) 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 over $1499.99 it will automatically route to the Approver authorized to approve requisitions for that specific cost center. REMINDER: Carts under $1500 will be processed by the Requester unless the Requester specifically wants the Approver to review it before it is submitted. If you want the Approver to review a particular requisition, you may Assign the cart to the Approver.
1. Click the Action Items link (top right).
2. Click Carts Assigned To Me. All requests pending your review will display.
3. Under Drafts Assigned To Me, click the Shopping Cart Name. The shopping cart will open for your review.
4. In the active shopping cart, click the Assign Cart button at the top right.

There are three ways to select an Assignee: choose the default Assignee that you setup in your Profile, search from the Profile Values (if you setup multiple Assignees in your Profile), or search for an Assignee from All Assignees listed in BobcatBUY.
   a. A default Assignee automatically displays from your Profile. If this is the correct Assignee, enter a Note to the Assignee. The note will be included in an email notification. Click the Assign button.
   b. If you setup multiple Assignees in your Profile, click the Select From Profile Values link. Click the down arrow and choose the appropriate Assignee. Enter a Note to the Assignee. Click the Assign button.
   c. To select an Assignee from your organization. Select the Search For An Assignee link. Enter the following: Last Name, First Name, User Name, Email, or Department and click the Search button. Click the Select link next to the appropriate Assignee. If you would like to add this person to your Profile, click the Add To Profile checkbox. Enter a Note to the Assignee and click the Assign button.

Approval Workflow Overview
There are three different approval workflow processes in BobcatBUY:
1. Requisition Approval Workflow
2. Purchase Order Approval Workflow
3. Invoice Approval Workflow

The workflow process begins when:
   a. A cart is submitted
   b. Upon approval, the purchase order is sent to the supplier
   c. The purchase order information is sent to Oracle to create the encumbrance
   d. The item/service is received
   e. The invoice is entered
   f. Notification is sent to Oracle to verify it is okay to pay the supplier

Instances when a purchase order will not be created are: Request To Add New Supplier form, Change Order Request form, or a Close PO Request form is submitted. You may still view its requisition approval workflow. NOTE: There is a purchase order created for a Direct Payment form but it is not sent to the supplier. BobcatBUY’s electronic process of approval workflow is comparable to the approval process (documentation path) of the paper requisition when it travels through different offices for various approvals.

Where Is The Requisition In The Approval Process?
You have the ability to view the approval workflow the requisition goes through before it is delivered to the supplier. You may view the approval process to determine where your requisition is. You will also see the Approver’s contact information (Name, Email, and Phone Number) displayed. If the requisition stops at a particular step, you may contact the Approver to inquire.
1. To view the Approval Workflow Process the requisition goes through before being delivered to the supplier, open the appropriate Requisition and click the View Approvals tab. Approvers for this folder were notified electronically to let them know a pending requisition is waiting for review.

During the Funds Available Validation, BobcatBUY checks Oracle Financial Management System to verify there are funds available in the specific Cost Center charged. If there is not enough money available, a Note is entered in the History of the requisition. No auto-email message is sent to users regarding insufficient funds. The Note indicates, “The Cost Center XXX does not have sufficient funds for this purchase.” The process will not stop, except in the case of a Grant Account:
2. If you realize the request is being delayed, click the View Approvers link in the current step. This will provide contact information for the Approver for this step.
3. Contact the Approver to inquire about status.
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 automatically be 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. Click the Shop icon, hover over My Carts And Orders, and click View Draft Shopping Carts.
2. Click the Assign Substitute link (top left). A User Search window opens.
3. You may search for the appropriate substitute by Last Name, First Name, User Name, Email, or Department. Enter your search criteria and click the Search button.
4. From the search results, click the Select link next to appropriate Substitute. The new Requester’s name will appear at the top of the page, confirming your selection.

NOTE: Any carts currently assigned to you must be acted on by YOU. All subsequent shopping carts will be assigned to your Substitute.

End Substitution
1. Click the Shop icon, hover over My Carts And Orders, and click View Draft Shopping Carts.
2. To End Substitution, click the End Substitution link, located at the top left of the page.

The screen will refresh and the Assign Substitute link will appear again. Carts will no longer be redirected to your Substitute.

Return A Shopping Cart
The Requester may decide to Return a Cart back to the Shopper for several reasons. Occasionally you might have a shopping cart assigned to you by mistake. Additionally, you may want the Shopper to provide additional information or select a different Cost Center. Instead of asking the Shopper to Unassign the shopping cart, you may return the shopping cart to the Shopper. As a result, the Shopper can make the necessary corrections and/or assign it to the appropriate person.

The Requester may only return the shopping cart back to the Shopper; the Requester cannot return the shopping cart to an alternate BobcatBUY user. If you Return a Cart, you must enter a reason why the shopping cart is being returned. This will be recorded in the requisition’s History. The Shopper will also receive this information via email.

1. Click the Shop icon, hover over My Carts And Orders, and click View Draft Shopping Carts.
2. Under Drafts Assigned To Me, click the Shopping Cart Name. The shopping cart will open for your review.
3. To return the shopping cart back to the Shopper, click the Return Cart button.
4. The Return Cart window displays.
5. Enter your Note text and click the Return button.
6. The Returned Cart symbol displays.

Withdraw A Requisition Returned By The Approver
If a requisition is returned by the Approver, it returns to the Requester. Depending on the reason the requisition was returned, you may decide to Withdraw the requisition.

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

1. To access the returned requisition, click the Shop icon, hover over My Carts And Orders, and click View Draft Shopping Carts. Look under My Returned Requisitions.
2. Click the Withdraw button next to the appropriate requisition.
3. The Requisition Withdrawn symbol displays.
4. Click the Requisition Number to open it.
5. When the requisition displays, click on the History tab. All of the Comments and History will display.

Overview Of Actions For A Withdrawn Requisition
There are three actions the Shopper or Requester may perform on a withdrawn requisition: Add A Comment And Attachment, Copy To New Cart, and Add Notes To History. NOTE: Any BobcatBUY user may access any Requisition in BobcatBUY.

Quick Search
Any OHIO BobcatBUY user may access any requisition in the system. If you know the requisition number, you may use the Quick Search feature (top right).
1. To perform a Quick Search, click the Magnifying Glass icon (top right).
2. In the Quick Search fields, click to select the type of document you want to search for and enter the Number and press Enter.

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

Add A Comment And Attachment
Comments and Attachments may be added by the Shopper, Requester, and Approver. You may add a comment to the requisition even if it has already become a purchase order. NOTE: Do not attach an invoice to a purchase order; Procure To Pay will not receive it.

For Shoppers and Requesters:
1. Open the appropriate shopping cart.
2. In the shopping cart, click the Edit Requisition button.
3. To add a comment, click the Comments tab.
4. Click the Add Comment button.
5. Enter your Comment in the text field.
6. To add an Attachment, in the Attachment Type drop-down list, select File. Enter a File Name and click the Browse button to navigate to where your file is saved. Double-click the file that you would like to attach, and click Add Comment.
NOTE: When comments are included, the Comments tab includes a number in parenthesis equivalent to the number of comments that have been added. This is a visual alert to BobcatBUY users. To view a comment, click the Comments tab.

For Approvers Only:
1. Open the requisition. In the Available Actions drop-down list, select Add Comment and click Go.
2. You may also email your comment to any BobcatBUY user. The Assignee is automatically listed under email notifications. Click the checkbox next to the name of the person that you would like to email your comment to.
3. To add additional email recipients, click the Add Email Recipient... link and Search for the person that you would like to email your comment to. Click the Select link next to the appropriate recipient.
4. Enter your Comment in the text field.
5. To add an Attachment, in the Attachment Type drop-down list, select File. Enter a File Name and click the Browse button to navigate to where your file is saved. Double-click the file that you would like to attach, and click Add Comment.

View Document Comments
When you open a requisition, purchase order, invoice, or receipt, Comments may be viewed via the Comments tab. To view the trail of comments, review the Comments as well as the History for the current document that is open OR for all associated document types (requisition, purchase order, invoice, and receipt).
1. To view Comments, click the Comments tab. By default only the comments for the current document are displayed.
2. You may use the Filter to view associated documents. Click the Show Comments For down arrow and select the appropriate document or choose All to display Comments for all of the associated documents.

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

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

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.
1. If you are the Shopper, click the Orders & Documents icon, hover over Document Search, and click Search Documents.
2. Click the My Requisitions link (located under the document search field).
3. Click the Requisition Number to open it.
4. For other users, open the requisition by using the Quick Search feature (top right).
5. When the requisition displays, in the Available Actions drop-down list, select Add Notes To History, and click Go.
6. Enter your Note text and click the Attach button.

View Others Draft Carts
You may view another BobcatBUY users draft carts in order to answer questions and provide assistance. A draft cart is any cart that has not been Submitted into workflow. When viewing someone’s draft cart, you will see a Summary; it does not display comments or attachments. Likewise, it does not display details pertaining to Shipping, Cost Center, or Natural Account values that have been modified at the line level.
1. Click the Shop icon, hover over Admin, and click View Draft Carts From Other Users.
2. Enter the appropriate search criteria and click the Search button.
3. Click the Shopping Cart Name to open it. The summary of the draft requisition displays.

View The History (Withdrawals, Comments, And Notes)
You may view the History (Comment, Note, and reason for a Withdrawal).
1. To perform a Quick Search, click the Magnifying Glass icon (top right).
2. In the Quick Search fields, click to select the type of document you want to search for and enter the Number and press Enter.
3. Click the Requisition Number to open it.
4. When the requisition opens, click the History tab. You will be able to view the entire History for this requisition. The History tracks the Date/Time of each change, the Action, Comment, Note, and reason entered for a Withdrawal.
5. You may use the Filter to view any associated documents. Click the +Click To Filter History button. In the Filters window, you may use one or more of the following filters: Start Date, End Date, Action, and Show History For (Approvals, Modifications, Integration, Miscellaneous).
6. Select one of the following from the Action drop-down menu: Blank, Approvals, Modification, Integration, and Miscellaneous.
7. In the **Show History For** drop-down menu, you may view **Comments** for one specific document or choose **All** to display comments for all of the associated documents. Click the **Apply** button.

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

8. Under the **Note** column, if there is additional text, click the **More** link to view the entire note.

**Process A Returned Requisition (From An Approver)**
1. To access the returned requisition, click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**. Look under **My Returned Requisitions**.
2. Click the **Shopping Cart Name** to open it.
3. Click **Edit Requisition**, make the necessary revisions, and click the **Submit Requisition** button.

**NOTE:** After re-submitting the cart, the **Approver** will review the requisition (with the suggested revisions) again.

**A Rejected Requisition (The Entire Requisition OR Certain Line Items)**
An entire requisition may be approved or one or more line items may be **Rejected**. If part of a requisition is rejected, 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 the **Requester** notifying him of the **Rejection**. The rejection notice also may be viewed in the **History** tab. **NOTE:** It is recommended that you keep your email notifications enabled.

1. To perform a **Quick Search**, click the **Magnifying Glass** icon (top right).
2. In the **Quick Search** fields, click to select the type of document you want to search for and enter the **Number** and press **Enter**.
3. Click the **Requisition Number** to open it.
4. When the requisition displays, click on the **History** tab. All of the **Comments** and **History** will display.
5. There are four actions the **Shopper/Requester/Approver** may perform on a rejected requisition:
   - Add Comments And Attachments
   - View Document Comments
   - Copy To New Cart
   - Add Notes To History

**The Approver Rejected The Entire Requisition**
If the **Approver Rejects** the requisition, an email is sent to the **Requester** notifying him of the rejection.

1. To perform a **Quick Search**, click the **Magnifying Glass** icon (top right).
2. In the **Quick Search** fields, click to select the type of document you want to search for and enter the **Number** and press **Enter**.
3. Click the **Requisition Number** to open it.
4. When the requisition displays, click the **History** tab. All of the **Comments** and **History** will display.

**The Approver Rejected One Or More Line Items**
If the **Approver Rejects One or More Line Items** on the requisition, an email is sent to the **Shopper and Requester** notifying them of the **Rejection**. The **Approver** must complete the approval process for the remaining line items on the requisition. Once the approval process is complete, you may access the requisition for additional information.

1. To perform a **Quick Search**, click the **Magnifying Glass** icon (top right).
2. In the **Quick Search** fields, click to select the type of document you want to search for and enter the **Number** and press **Enter**.
3. Click the **Requisition Number** to open it.
4. Click the **Summary** tab. The **Status** displays **Approved** (green checkmark) **But Line Item Rejected** (red x) symbol.
5. Scroll down to view the rejected line item. The line item displays the **Rejected Line Item** symbol. The **Requisition** has completed this approval step and will move to the next workflow requirement.
6. For additional details, click the **View Approvals** tab or click the **History** tab.

**The Approver Placed The Requisition On Hold**
If the **Approver Places A Requisition On Hold**, you do not need to do anything unless the **Approver** asks you for specific information. **NOTE:** No email is sent when a requisition is placed on hold, however, you may view this information via the requisition’s **View Approvals** tab.

1. To perform a **Quick Search**, click the **Magnifying Glass** icon (top right).
2. In the **Quick Search** fields, click to select the type of document you want to search for and enter the **Number** and press **Enter**.
3. Click the **Requisition Number** to open it.
4. To view the approval workflow, click the **View Approvals** tab.
5. 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.