**Purpose**

The purpose of this Quick Reference Guide (QRG) is to acquaint users with the new look and feel of the new BobcatBUY user interface (BCB UI). The UI enhancements are being implemented to give BCB a cleaner, more open look and feel. Most of the enhancements do not affect the functionality of the system, they only affect the layout of the screen and the look and feel of the system. The biggest change is the move from a tabbed view to a scrolling view.

**Universal Icons**

Regardless of where you find these icons in BCB, the functionality is the same.

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>![Three Dots]</td>
<td>![Eye]</td>
<td>![Print]</td>
<td></td>
</tr>
<tr>
<td>Show/Hide Sidebar – Click to show or hide the right sidebar</td>
<td>Filter View – Isolate specific sections to view; if you want to see one specific aspect, this will show it to you</td>
<td>Print – Opens print view of screen</td>
<td></td>
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<tr>
<td>![General]</td>
<td></td>
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</tr>
<tr>
<td>Hide/Show Optional Fields – This is a one-time only action</td>
<td>Edit – Click this icon anytime you would like to add/edit info</td>
<td>Show Section – This shows that the section is open; click to close. This view will be maintained throughout the process</td>
<td></td>
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<tr>
<td>![Arrow]</td>
<td></td>
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</tr>
<tr>
<td>Hidden Section – This shows that the section is closed; click to open. This view will be maintained throughout</td>
<td>Actions drop down – Make sure the check is in the box to enable the actions dropdown</td>
<td>Cart/Requisition/PO/Invoice Numbers – Available actions have been moved to this drop down</td>
<td></td>
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**System Tour**

When you log into BobcatBUY on July 26, you will be welcomed with a new pop-up window. You may select to see a step-by-step tour and/or a video about the new user interface. If you select the No radio button to the Show me this again prompt, you will no longer see this popup window in the future. You may also bypass this window for the time being by clicking the Maybe next time button.

If you select No to the Show this again question, you will no longer see this pop-up window. To turn it back on, click the profile drop down at the top right of the screen and select View My Profile. When your profile opens, select the Guided Tour Instructions on the left menu under your name. Click the Edit Section link to update your response to the questions.

**New Search Experience - Simple Search**

The biggest visual change on the home page is the new simple search experience. The functionality remains the same, however the placement of the buttons has been moved.

**Current UI**

![Current UI Image]

**New UI**

![New UI Image]

**UI Updates:**

1. The Shop dropdown category search has been changed and the Shop dropdown has been removed.
2. There are now two tabs above the search text field: Simple and Advanced. The advanced search link has been removed.
3. The Go to links and Browse links have been moved above the search bar and a new Shop link has been added to the Go to links.
New Search Experience – Advanced Search

The only changes here are cosmetic. The Advanced search link is now a tab since the link was removed from the menu.

Current UI

New UI
Returned search results will look very similar to the current version. The only change is in the look and feel of the filters on the left side of the screen.

Current UI

New UI

Note: If you would like to see this list in a grid view, click the four boxes next to the Best Match drop down. Click again to return to a list view.
Non-Catalog Items

The add Non-Catalog Item fields have had some fields renamed.

Current UI

![Image of Non-Catalog Item interface](image-url)
New UI

- Enter Supplier has been renamed to Existing Supplier.
- Brief description of service has been renamed to Description.
- Price estimate has been renamed to Price.
- Product details has been renamed to Additional details.
If you are entering an existing supplier, the look and feel of the fulfillment center has changed. Click the + to add the supplier.

The Shopping cart has changed; the biggest change is in the page layout. The screens have moved from a tabbed format to a scrolling format.

Current UI
1. The Search box from the Home page is now available in the cart.
2. The Edit Requisition and Assign Cart buttons now display at the top right corner.
3. Supplier Options have been added as a dropdown and links have been removed.
4. Actions drop down “For selected line items” name has been removed and replaced with a drop down arrow, which is only enabled when the items are selected. Note: You also have sub-menus available to Move to Another Cart and Add to Draft Cart of Pending Req/PO to add items.
5. Commodity Code has been added as a new field.
6. Item details can be collapsed by clicking on the drop down arrow.

Requisitions

Most of the changes are in the Requisition portion of the purchase in BobcatBUY. The screens are broken down into 3 sections to make it easier to view. Scroll to see the various changes made to the Requisition screen.

Requisitions Current UI (Part 1)
1. The tabs for the requisition have been removed. A drop down has been added to the Requisition Number. The Return to Cart, Copy to New Cart, and Continue Shopping links were removed and added to the Requisition drop down.

An additional button called Validate with ERP and Place Order has been added. Review the Realtime ERP Validation QRG for more details.

2. The Exceptions section has been moved and renamed to Correct These Issues. When you click on the link Required: Does this purchase require A&E purchasing exception, a new window will open displaying
the A&E information. You can also scroll down through the requisition to find the missing required fields. The functionality remains the same as in current UI.

New UI

3. The old Summary page is now called the Requisition page. A new PO Preview tab has been added which displays the line-item information.

4. The ellipsis next to each section gives the user the opportunity to Show Optional Fields or Hide Optional Fields. Click the pencil icon to edit details. This is a one-time only action when you choose to hide optional fields, the default is set to show all fields.
5. The Shipping section can be added or updated by clicking the pencil icon.
6. What’s next for my order? Click this dropdown to view the approval workflow. The View Approvers tab has been renamed to What’s Next for my order? The current workflow step is highlighted with the green arrow pointing towards the workflow step.

Click the Printer icon in the workflow section to see the approvals in the current format. Click the open in a new window icon to see the full list of approvals for this order.

7. Cost Center and Object Code Sections can be updated by clicking the pencil icon.

Current UI
New UI

- Click the + button to add a split.
- Click the diagonal arrow in the Account Type field to select GL or Grants account type.
- Click the magnifying glass to open a search box.

- Type a full or partial cost center to start searching.
- Click on the Filter button to search or press the enter key on your keyboard.
- Click the + button to add the account.
• Be sure to scroll to the right to see all the options available.
• Select the type of split you would like to apply, % of Price or % of Quantity from the drop down.
• After entering the split, click on the check mark to calculate the split amount.

8. A new button called Filter View has been added with the options below:

Each option allows the user to isolate specific information to review and/or edit.
### Requisitions Current UI (Part 2)

**Internal Notes and Attachments**

- **Internal Note:** No note
- **Internal Attachments:** (Add Attachments)

**IT Questions**

- Does this include the purchase of technology (software/cloud storage)? 
  - No value
- Will this purchase store any sensitive information? 
  - No value
- Will this purchase store data offsite (cloud services)? 
  - No value
- Will this service be used by more than 50 students or members of the public? 
  - No value

**Compliance Questions**

- Does the purchase require A&IE? 
  - No value
- Purchasing Exception? 
  - No value
- Exception requested by? 
  - No value
- Exception Reason 
  - No value
- A&IE Justification 
  - No value

**External Notes and Attachments**

- Note to all Suppliers
- Attachments for all Suppliers
- (Add Attachments)

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**Supplier / Line Item Details**

**BROWN ENTERPRISE SOLUTIONS LLC**

- **Contract:** No value
- **PO Number:** To Be Assigned

The item(s) in this group were retrieved from the supplier's website. **What does this mean?**

**Product Description**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hammermill Copy Plus 8.5&quot; x 11&quot; Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream, 3 Reams/Carton (105040)</td>
<td>24422900</td>
<td>CT</td>
<td>19.69</td>
<td>3 CT</td>
<td>59.07 USD</td>
</tr>
</tbody>
</table>

**Note:**
- Manufacturer Name: INTERNATIONAL PAPER
- Manufacturer Part Number: 105040
- Commodity Code: 536 Print Services
- Internal Note: No note
- Internal Attachments: (Add Attachments)
In the new UI the Supplier/Line Item details such as the Manufacturer Name, CAS Number, and Supplier details have been added from the More info... link in the current UI. The item details can be expanded and collapsed by clicking the arrow to the left of the item in the new UI.
• Line Level actions available:

Use the same steps outlined in the Cost Center and Object Code section above to apply line item splits to your order.

• Click the drop down arrow to see the line item options available.
Requisition Submission

Requisition Submission Confirmation Current UI

- In the new UI the Search field has been added to the top of the Requisition Confirmation screen.
- The Next Steps section has been removed. A new section called Options has been added. This section includes links to Print, Recent orders, and Return to home page.
View Workflow

Workflow for Submitted Requisitions Current UI

Workflow for Submitted Requisitions New UI

The biggest changes is that the workflow has changed from a horizontal view to a vertical view. This is embedded into the Requisition Summary page.

The Approvals tab has been removed. Click the Departmental Approval step to see all the approvers in the workflow step.
Assign and Approve the Requisition

Assign and Approve the Requisition Current UI

Assign and Approve the Requisition New UI

- In the new UI the Assign to myself action from the drop down has been changed to a Claim button.

Current UI
In the new UI Requisitions can be approved by clicking one of the Approve and Next options from either the Approve and Next button at the top right or the Requisition number drop down menu.

Once the Requisition is approved, the PO Number can be found in the Related Documents section.

Purchase Orders

You will see the same look and feel applied to the PO section just like in the Requisitions section. Functionality has not changed.

Current UI (Part 1)
1. The Supplier name has been moved from the top of the PO summary page.
2. The Available Actions drop down has been move to the Purchase Order number drop down. Options were not changed.
3. The approvals tab has been removed and added to the What’s Next section on the right side of the screen.
4. The General Information section has been changed to look like that section on the Requisition page.
5. The Sipping Information section has been changed to look like that section on the Requisition page.
6. The Billing Information section has been changed to look like that section on the Requisition page.
7. Documents related to the PO, like the Requisition or Invoice are available in the Related Documents sections. The What’s Next section show the PO Approval workflow just like in the Requisition workflow.
BobcatBUY User Interface Upgrade 21.2

Current UI (Part 2)
New UI (Part 2)

- The Actions drop down is now only available as a drop down when an item is selected with a check mark in the box. This is displayed like the Requisition actions.
The UI on the Invoice page has been changed to have the same look and feel as the Requisition and PO pages.

**Current UI**

**New UI**
1. The Supplier Name has been removed from the top portion of the screen, displaying only the Voucher Number.

2. The Invoice Summary page has been consolidated to one page, removing all the subtabs from the current UI. All other tabs have been removed except for Matching, Comments, Attachments, and History.

3. The Available Actions drop down from the current UI has been removed and placed in the Invoice Number drop down.

Current UI

New UI

4. General (For AP use only) section – UI has been changed and all the fields remain the same.

5. Addresses section - UI has been changed and all the fields remain the same.

6. Note/Attachments - UI has been changed and all the fields remain the same.

7. Payment Information (AP Use only) - UI has been changed and all the fields remain the same.

8. Discount, Tax, Shipping & Handling – UI has been changed and all the fields remain the same.

Questions?

For questions contact Finance Customer Care at financecustomercare@ohio.edu.