Table of Contents
I. Welcome Message ................................................................. 3
II. Update Items In The Cart From The Cart Summary Page ............. 4
III. Add Additional Items To The Shopping Cart .............................. 5
IV. Remove Items From A Shopping Cart From the Cart Summary Page .... 5
V. Delete A Shopping Cart .......................................................... 6
VI. Add Prevailing Wage Checkbox .............................................. 6
VII. The Task Bar And Updating Header/Line Item Details ............... 8
VIII. Update Ship To Address in Header/Line Item Details ................ 9
IX. Copy A Line Item’s Shipping Addresses To Other Line Items ......... 13
X. Update Billing (For Year End Purposes Only) ............................ 16
XI. Update Cost Center In Header/Line Item Details ....................... 16
XII. Add A Split In Header/Line Item Details ................................ 19
XIII. Add A Split In Header/Line Item Details Using Code Favorites .... 22
XIV. Natural Account In Header/Line Item Details .......................... 23
XV. Edit The Commodity Code For Multiple Lines .......................... 26
XVI. Internal Notes And Attachments (OHIO Substitute W-9, Quotes/Bids) 27
XVII. External Notes And Attachments ......................................... 31
XVIII. Remove All Items From The Cart ........................................ 36
XIX. Remove Items/Modify Items From A Punch-Out Catalog ............ 38
XX. Move Items To A New Cart Or An Existing Cart ....................... 38
XXI. Change Supplier For Non-Catalog Items & Forms .................... 40
XXII. Add To Draft Cart Or Pending Requisition/PO ........................ 42
XXIII. Assign The Shopping Cart ................................................ 43
XXIV. Auto-Email Messages Sent By BobcatBUY ............................ 48
XXV. Recall (Retrieve) The Cart After It Has Been Assigned ............. 50
XXVI. Where Are My Shopping Carts? ......................................... 51
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXVII.</td>
<td>How Do I Find My Shopping Cart Once It Has Become A Requisition?</td>
</tr>
<tr>
<td>XXVIII.</td>
<td>Quick Search</td>
</tr>
<tr>
<td>XXX.</td>
<td>Overview Of Actions To Perform On A Withdrawn Requisition</td>
</tr>
<tr>
<td>XXXI.</td>
<td>Add Comments And Attachments</td>
</tr>
<tr>
<td>XXXII.</td>
<td>View Document Comments</td>
</tr>
<tr>
<td>XXXIII.</td>
<td>Copy To New Cart</td>
</tr>
<tr>
<td>XXXIV.</td>
<td>Add Notes To History</td>
</tr>
<tr>
<td>XXXV.</td>
<td>View Others Draft Carts</td>
</tr>
<tr>
<td>XXXVI.</td>
<td>View The History (Withdrawals, Comments, And Notes)</td>
</tr>
<tr>
<td>XXXVII.</td>
<td>View Approval Workflow Overview</td>
</tr>
<tr>
<td>XXXVIII.</td>
<td>Where Is My Requisition In The Approval Process?</td>
</tr>
<tr>
<td>XXXIX.</td>
<td>View OU’s Purchase Order Terms And Conditions</td>
</tr>
<tr>
<td>XL.</td>
<td>The Purchase Order Approval Process</td>
</tr>
<tr>
<td>XLI.</td>
<td>The Invoice Approval Process</td>
</tr>
</tbody>
</table>
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.

![Terms and Conditions](image)

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

![Message Window](image)

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. Update Items In The Cart From The Cart Summary Page

Once products have been added to the shopping cart, it may be necessary to update some of the product information, such as Quantity or additions to the cart.

To access the Shopping Cart to be updated, click on the Shop icon located in the Main Menu Banner to the left of the screen. Hover over My Carts and Orders > Open My Active Shopping Cart. The screen automatically opens to the Active Shopping Cart summary screen.

Also, if you click on View Draft Shopping Carts, all carts that HAVE NOT BEEN SUBMITTED for approval will appear in the My Drafts section and carts that HAVE BEEN SUBMITTED will appear in the My Drafts Assigned to Others section. The current Active Cart uses the highlighted Cart Icon. Click the Shopping Cart Name link to display the Shopping Cart Summary screen.

The Shopping Cart Summary screen is displayed.
This cart contains requests from two suppliers: Spectrum Chemicals & Laboratory Products and VWR International. In this example we will update the Quantity for VWR from 23 to 3.

- Highlight the existing number in the Quantity field and enter the desired Quantity.
- Click Save at the bottom of the page.

The updated Quantity, Ext. Price and Supplier Subtotal displays on the refreshed page.

**III. Add Additional Items To The Shopping Cart**

Once you have opened the shopping cart by clicking on the name of the cart, you may click on the Home icon and shop for the additional items to add to the cart. See the Shopping & Cart document for more specific shopping instructions.

**IV. Remove Items From A Shopping Cart From the Cart Summary Page**

If you want to remove/modify items added to a shopping cart from a Punch-Out catalog you must process this differently than removing items from a Hosted Catalog. Click on Modify Items link listed above the product descriptions in the Line Item/Details section of the requisition. For detailed instructions on removing items from punch-out catalogs refer to the section; Remove Items/Modify Items From A Punch-Out Catalog.

1. Open the Active Shopping Cart.
2. To remove an item, click the Checkbox at the end of the line item.
3. Click the For Selected Line Items dropdown, choose Remove Selected Items and click Go.

4. Click Save at the bottom of the page. The line item has been removed.
V. Delete A Shopping Cart

Click on the Shop icon located in the Main Menu Banner to the left of the screen. Hover over My Carts and Orders > View Draft Shopping Carts.

All carts that HAVE NOT BEEN SUBMITTED for approval will appear in the My Drafts section. The current Active Cart is noted in the left column and uses the highlighted Cart icon.

Click the Delete button for the cart you want to delete.

The cart will be removed from My Drafts immediately.

VI. Add Prevailing Wage Checkbox

If the requisition contains Prevailing Wage labor, the prevailing wage checkbox must be selected in this shopping cart summary screen or in the General section of the Edit Requisition choice. The requisition will automatically route to the Prevailing Wage Coordinator for review.

WARNING: You must click the Save button anytime you make changes to the Shopping Cart summary page.
1. Click on the shopping cart Quick Link located at the top-right of the screen. Click on the View My Cart button to open the Active Shopping Cart Summary screen.

2. Click the Prevailing Wage checkbox located under the Edit Requisition button, and click Save.

You may also access the prevailing wage field in the shopping cart,
1. Select Edit Requisition,
2. Click the General tab, which displays the General section below.
3. In the General section click the Edit button

4. Click the Prevailing Wage checkbox and click Save.
VII. The Task Bar And Updating Header/Line Item Details

In a requisition, various details such as *Ship To Address, Cost Center Values*, and *Natural Account* are associated with each requisition. BobcatBUY uses default values set up in the *User Profile* section. 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.

**NOTE:** Setup information to be applied to the entire requisition at the *Header Level* and work by exception at the *Line Level*. Example: If you are using the same accounting code for 6 out of 10 of the line items, we recommend that you enter the “primary” code for the majority in the *Header*, and then modify the remaining 4 line items individually in the *Line Item Details* section.

**WARNING:** You must complete the Header requirement in each section.

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

The Draft Requisition page identifies information that needs to be updated. The *Red Exclamation Points* at the top of the page indicate mandatory items that must be completed.

![Shopping Cart](image)

Edit the required fields and click *Assign Cart* or *Submit Requisition*.

**WARNING:** You may edit any information at the *Header level* or the *Line level*. You may edit information at the *Header level* if it applies to all of the items in the requisition. This information is usually setup as the default information (refer to *User Profile* document to setup defaults). If any item at the *Line level* is different than the *Header* information then you must edit that information at the *Line level*. For instance if you bought items for two different faculty members and each line item must be shipped to different addresses, then one of the items
would be shipped to the header information and the other *Ship To Address* must be edited at the *Line* level. Also, if one of the items in your shopping cart must be charged to a different account, then you must edit the *Cost Center* for that particular item at the *Line* level.

**VIII. Update Ship To Address in Header/Line Item Details**

1. To edit a *Header* or *Line Item*, select the *Shipping* tab.

2. To modify a *Shipping* address, go to the *Header* section or the *Line Item Detail* section.

3. Select the *Edit* button next to *Ship To*.

   **NOTE:** If you want to setup your default *Ship To* address, refer to the *User Profile* document.

4. If you have setup several addresses in your *User Profile*, click the *Select From Your Addresses* down arrow.

5. Scroll down and select the appropriate address.

6. If the address is not in your *User Profile*, click the *Click Here* link.
7. Next click the Select From Org Addresses link.

8. Enter specific text in the Nickname / Address Text field and click the Search button.

9. Or to view all the addresses, click the Search button.

10. Click the Select link when you find the appropriate address.

11. The selected address will display.
12. Next, add/modify the **Atttn.**, **Dept.**, and **Fl/Rm/Ste** (Floor, Room, Suite) fields.

13. If this **Ship To Address** is one that you may use frequently and it is has not been added to your **User Profile**, you may add it by clicking the **Save This Address For Future Use** check box.

14. When you click in the checkbox another field will be displayed. You may enter a **NickName** for the address you are saving in your profile to help better identify the address when you are shopping. Enter the name in the **Name This Address** field.

15. If you want to make the newly added address your default address you may check the box under the **Name This Address** field.
16. When all of the *Ship To Address* information has been entered, Click the **Save** button

If you change a *Ship To Address* in the Line Item Detail section, the Ship To Address detail is listed for that particular item. The message will display **values have been overridden for this line.**

The other Line Items that use the same Ship To Address as the Header will display the message **Ship To (Same As Header).**
IX. Copy A Line Item’s Shipping Addresses To Other Line Items

To Copy A Line Item’s Shipping Address To Other Line Items
If you edit the Shipping Address for a specific line item, a Copy To Other Lines link appears in below the modified Shipping Address. It also appears in the Shipping Address section of the Header. This can be used in two ways.

1. Select the Shipping tab.

2. A Ship To window displays all of the other line items.

3. To copy the address that you entered for one Line Item to other line items on the requisition, click the Copy To Other Lines link.

4. Select the checkbox to the far right of the window next to the Line Items that you want to modify.

5. Click the Copy button.
To Copy A Header’s Shipping Address To Other Line Items

1. Select the Shipping tab.

2. To copy the Header address to one or more Line Items, click on the Copy To Other Lines link in the Header section.

3. A Ship To window displays all of the Line Items on the requisition.

4. Select the checkbox next to the Line Items that you want to modify.

5. Click the Copy button.

6. Now all the line items display Ship To (Same As Header).
Questions? Call 597-6446 or email financecustomercare@ohio.edu
X. Update Billing (For Year End Purposes Only)

The Billing section informs the supplier where to mail invoices for payment. It also specifies which Fiscal Year the expense will be charged to. Near the end of the fiscal year ONLY, Procure to Pay will notify all BobcatBUY users to inform them this feature has been enabled. At that point, you may specify the desired fiscal year. By doing this, you indicate whether you want the expense charged to the Current Fiscal Year or the Next Fiscal Year. NOTE: This feature is for year-end purposes only; it is only available until Procure to Pay closes the current fiscal year.

1. Select the Shipping tab.
2. To update the billing, next to Billing Options, click Edit.
3. If you want the requisition to be expensed to the current fiscal year budget, use the calendar icon to select the Current Date or if you want the requisition to be expensed to next fiscal year’s budget, use the calendar icon to navigate to 07/01/20XX.

XI. Update Cost Center In Header/Line Item Details

BobcatBUY uses default Cost Center values set up in the User Profile section. 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. If you did not setup one of your profile cost center accounts to be a default account the Cost Center section on the Task Bar will indicate that field must be completed.

1. To edit a Header or Line Item, select the Cost Center tab.

The Header Level information is located in the Cost Center section at the top of the requisition.
2. To edit the Cost Center at the Header Level, click on the Edit button in the Header section.
3. To edit the Cost Center for a particular Line Item select the Edit button at the Line level.
Under Accounting Codes, update the Cost Center information for each field that needs updated. If you setup Cost Center default values in your User Profile

4. Start with the Project Task field.

5. Click Select From Profile Values and Click the drop down arrow to view profile values.

6. Choose the appropriate Cost Centers from the drop-down list.

   a. If you choose a Project_Task number that is not the Null Project, And if the other fields do not automatically prefill,
      i. Click the Recalculate/Validate Values link and the Cost Center string will prefill to match the Project_Task value.
      ii. Modify the Cost Center values as necessary.

   b. If you choose a Project_Task number that is the Null Project(000000000) then you must
      i. Click in the FundType_Fund_Org field and select the appropriate value associated with the Project_Task value.
      ii. Then click the Recalculate/Validate Values link.

NOTE: If you set up a default FundType_Fund_Org and associated it with the Null Project when you select the Null Project the rest of the Cost Center string will prefill to match the Project_Task value. (See Profile Document for instructions on this task)
If you must search for a Cost Center that is not listed in your User Profile
7. Click Select From All Values link. A Custom Field Search window will open.
8. Enter a Value and/or Description
9. Click Search.
10. Click Select next to the appropriate Cost Center value. The other Cost Center values in
     the other fields will update to match the Project_Task value (unless your Project_Task
     value is the null project). For a Null Project_Task value you must modify each segment.
11. Modify these Cost Center values as necessary and click Save.
XII. Add A Split In Header/Line Item Details

You have the ability to charge the entire requisition or specific line items to **Multiple Cost Centers**. BobcatBUY uses default Cost Center values set up in the User Profile section. 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.

1. To edit a **Header or Line Item**, select the **Cost Center** tab.

   ![Requisition Tab](image)

   The **Header Level** information is located in the **Cost Center** section at the top of the requisition.

2. To edit the **Cost Center** at the Header Level, click on the **Edit** button in the **Header** section.

   To edit the **Cost Center** for a particular Line Item select the **Edit** button in that particular **Line** level.

3. In **Accounting Codes** display, click the **Add Split** link. The window will expand and a second row will display; the second row is a duplicate of the first row. You must select the appropriate account number (for the split) in each row. You may add as many splits as necessary to split the expense between the appropriate accounts.

   ![Accounting Codes](image)

   ![Accounting Codes Table](image)

4. Click **Select From Profile Values**

5. Click the down arrow to select the desired account number from the drop-down menu.
6. Or click Select From All Values, enter your search criteria in the Custom Field Search window and click Search. Select the account number from the values available.

7. Select a method for splitting the expense, and enter a numeric value for this method. The options available are % of Price and % of Quantity.
   
a. Split by % of Price: If you want to split the dollar amount between two or more Cost Centers
   
      o Choose % of Price
      o Enter the number of the percent split into the field for each Cost Center.
      o Select the Recalculate/Validate Values link to refresh the calculations. Your total split must equal 100%. If it doesn’t, the system will display an error message until you enter the correct split percentages.

      o Click the Show Monetary Calculations link to view the dollar amount of the split that will be charged to each Cost Center. These values go away when you click Save.
Click **Save**. Once you click **Save** the Edit button appears. If you need to edit the Cost Center split again you may click the **Edit** button. The values at the line level update to reflect the split in Cost Codes, along with the % split.

### b. Split by % of Quantity:

Choose **% of Quantity** to split the quantity of the order between two or more **Cost Centers**.

- **Choose % of Qty**
- **Enter the % into the fields for each Cost Center**
- **Select the Recalculate/Validate Values** link to refresh the calculations and
- **Click Save**.

The split is listed as **% of Qty** and the percentages are listed below it.
XIII. Add A Split In Header/Line Item Details Using Code Favorites

Accounting Code Favorites allow you to store combinations of your favorite accounting codes that you use frequently. You can store these frequently used combinations in your User Profile and quickly select them when you edit a requisition. Split percentages can also be saved with accounting code favorites. You may create an unlimited number of code favorites. The Code Favorites must be setup in User Profile prior in order for this feature to be available on the requisition. (See User Profile document). You can modify the values – Header or Line Item – as needed.

1. Click the Cost Center tab

2. Click the Edit button in the Header section OR the Edit button at the Line level.

3. To select an Accounting Code Favorite, click the Select From Your Code Favorites dropdown arrow.

4. Select the desired Code Favorite from the drop-down menu and click Save.
3. The Code Favorite is not visible in the requisition.

**XIV. Natural Account In Header/Line Item Details**

**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/](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.

**WARNING:** Do NOT setup Natural Account values in your User Profile. If your Line Items are the same expense type, the Natural Account at the Header level will apply to all lines on the requisition. If some of your Line Items are a different expense type (Natural Account), add the Natural Account for the majority at the Header level and edit only the Line Items that are different from the Header. This ensures that each line item has the correct Cost Center associated with it.

Since there is no Natural Account default value setup in your User Profile, you will always see the message below. **Required field: Natural Account.**
1. Click the **Natural Account** tab

![Image showing the Natural Account tab in the interface]

2. Click the **Edit** button to update an existing **Natural Account**.

![Image showing the Edit button]

3. If you know the **Natural Account** value, enter it and Click **Save**.

4. If you do not know the value, click the **Select From All Values** link.

![Image showing the Select From All Values link]
5. Click the **Select From All Values** link.

6. Enter the **Value** and/or **Description** and click **Search**.

7. In the example below, the search will yield results displaying natural account codes that have the letters LAB in the description.

8. Click the **Select** button next to the appropriate **Natural Account** value. The screen is returned back to the requisition. The account code is loaded in the field.

9. Click the **Save** button.

10. The Natural Account value and description are displayed in the field.

**NOTE:** When you are assigning a **Natural Account** code to a **Shipping & Handling** charge, you must assign the **same Natural Account code** as the item charged.

See the instructions for *How To Add Shipping & Handling For A Non-Catalog Item* in the *Shopping & Cart* document.
XV. Edit The Commodity Code For Multiple Lines

This feature allows you to edit the Commodity Code of multiple lines in a single step. This feature is available when you Edit Requisition.

NOTE: The Commodity Code should only be changed for a Form or a Non-Catalog Item. All other purchases will automatically have the commodity code assigned.

1. In the shopping cart, select Edit Requisition.
2. Select the Requisition Summary tab.
3. Click the checkbox at the end of the line item you want to edit.
4. In the For Selected Line Items drop-down list, choose Change Commodity Code.
5. Click Go.

6. If you know the Commodity Code, enter it and click Save. A Saved Successfully message will display briefly and then return to the requisition.
7. If you don’t know the Commodity Code, click the Magnifying Glass icon located to the right of the Commodity Code field.
8. Click Search.

9. Scroll down and click Select to choose the appropriate Commodity Code.
10. Click **Save**.

A *Saved Successfully* message will appear briefly and then you will be returned to the requisition.

**XVI. Internal Notes And Attachments (OHIO Substitute W-9, Quotes/Bids)**

You have the ability to add Notes and Attachments to a Shopping Cart using the **Internal Notes and Attachments** section. Here you may enter free form notes or attachments that will be visible internally (OU staff only). These will **not be visible externally (suppliers)**. These should be used for things like attaching forms, a quote, or a bid. The OHIO Substitute W9 Forms should be attached to the link on the **Request To Add New Supplier** form. See **Forms** document for instructions.

1. Click the **Internal Notes And Attachments** tab.

2. Click the **Edit** button in the **Header** section or the **Line Item Detail** section.
3. **Enter your Internal Note** and click **Save**. The **Note** is displayed under **Internal Notes And Attachments** in the Header or **Internal Note** in each Line Item Detail section.

4. To add an **Attachment**, click the **Add Attachment** link in the Internal Notes.

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

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

7. Choose the **“file to Attach”**

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

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

10. **To move an Internal Attachment** to an External Attachment:
    a. Click the drop down menu next to **“remove”** for the attachment to move.
    b. Select **“Move to External Attachments”**.
The **Attachment** is displayed under **Internal Attachments** in the **Header section** of the **Internal Notes And Attachments**. The **Attachments** tab includes a number in parenthesis equivalent to the number of attachments that have been added to this document. It is a visual notification to all BobcatBUY users that there are attachments they need to view. You may click on the **Attachments** tab and view the attachments listed.

11. To include a **Link/URL**, click the **Add Attachment** link
12. Select **Link/URL** under the **Attachment Type** drop-down list.
13. Enter a **URL Name** in the **File/URL Name** field (This name should either be the name of the web site or describe the contents of the web site.
14. Enter the link or URL in the **Link/URL Name**.
15. Click **Save**.
16. The Website is displayed under Internal Attachments in the Header section of the Internal Notes and Attachments.

17. To remove an Attachment, click the Remove link next to the Attachment/URL that you would like to remove. A confirmation window is displayed.

18. Click the Remove button.

To Attach An Internal Attachment Or Note To A Specific Line Item Detail

1. Click on the Summary tab (under Requisition tab).

2. Scroll down to the Supplier/Line Item Details section
3. Click **Edit** button for the particular Line Item.

![Cart & Assign - v 14.2](image)

4. Click in the **Internal Note** section

![Internal Note](image)

5. Enter your **note**.

6. Click **Save**.

![Internal Note](image)

This is the Internal Note specific to this line item only. The Internal Note added in the Header of the document would apply to all line items in the requisition.

### XVII. External Notes And Attachments

You have the ability to add **Notes** and **Attachments** to a **Shopping Cart** and **Purchase Order** using the **External Notes and Attachments** section. This section should be used for executed contracts in addition to any special notes to the supplier that is pertinent to the processing and
review of your request. Here you may enter free form notes or attachments that will be visible internally (OU staff) and externally (suppliers).

**NOTE:** Anything that is attached in the *External Notes and Attachments* section will be dispatched with the PO to the supplier.

1. Click the **External Notes And Attachments** tab.
2. The notes are sent to the supplier when the order is completed.

*Notes and Attachments* can be managed at the **Header** level for all suppliers or at the **Line** level for a specific supplier/product. When entering a **Note** in the **Header** section it is considered a **Header** level note and would be sent to all suppliers in the cart.

3. Select the **Edit** button. A new window opens.
4. Enter your **Note**.
5. Click the **Expand** link to expand the text area.
6. Click the **Clear** link to delete the **Note** text.
7. Click **Save**, when you are finished

8. To add an **Attachment**, click the **Add Attachment** link.
9. Click "Select files..." button to navigate to the location where your file is saved
10. Choose the “file to Attach”
11. Click “Select Files...” to add another file (Repeat for each additional file).
12. Click “Save” when all files have been added.

13. To move an Internal Attachment to an External Attachment:
   - Click the drop down menu next to “remove” for the attachment to move.
   - Select “Move to External Attachments”.

The Attachment is displayed under External Attachments in the Header section of the External Notes And Attachments. The Attachments tab includes a number in parenthesis equivalent to the number of attachments that have been added to this document. It is a visual notification to all BobcatBUY users that there are attachments they need to view. You may click on the Attachments tab and view the attachments listed.

14. To include a Link/URL, click the Add Attachment link.
15. Select Link/URL under the Attachment Type drop-down list.
16. Enter a URL Name in the File/URL Name field.
17. Enter the link or URL in the Link/URL Name.
18. Click Save.

19. To move an External Attachment to an Internal Attachment
   - Click the drop down menu next to “remove” for the attachment to move.
   - Select “Move to Internal Attachments”
20. The Website is displayed under External Attachments in the Header section of the Internal Notes and Attachments.

21. To remove an Attachment, click the Remove link next to the Attachment/URL that you would like to remove.

22. Click the Remove link next to the Attachment/URL that you would like to remove. A confirmation window is displayed.
NOTE: Not all suppliers are capable of electronically accepting Notes and Attachments. It is recommended that upon submission of the purchase order you contact the Supplier directly to confirm notes and/or attachments have been received and acted on.

Some suppliers that do not support Notes And Attachments will automatically load a system notification informing the BobcatBUY shopper/requester that they do not support Notes. See the notification below.

To Attach An External Note To A Specific Line Item Detail

1. Click on the Requisition’s Summary tab.
2. Scroll down to the Supplier/Line Item Details section
3. Click Edit button for the particular Line Item.

4. Click in the External Note section
5. Enter your note
6. Click Save.

XVIII. Remove All Items From The Cart
1. In the Supplier/Line Item Details section of the Requisition, in the For Selected Line Items drop-down menu.
2. Select Remove All Items and click GO.
3. Click OK.

Questions? Call 597-6446 or email financecustomercare@ohio.edu
4. The Cart is now empty. It is an empty cart that you can use again to shop for new items.
XIX. Remove Items/Modify Items From A Punch-Out Catalog

Removing items from a Punch-Out Catalog is different from a Hosted Catalog.

1. Click the MODIFY ITEMS link listed above the product descriptions in the Line Item/Details section of the requisition.

2. BobcatBUY returns your Punch-Out Catalog shopping cart back to the Punch-Out Catalog web site.

3. Make your changes in the Punch-Out Catalog, follow the supplier’s steps to Update the cart, and transfer the cart back to BobcatBUY.

4. The Punch-Out Catalog shopping cart remains in tact as it is transferred back.

5. Once your shopping cart is returned to the Punch-Out Catalog, make the necessary revisions, additions, and deletions, then perform the necessary functions for that particular Punch-Out Supplier to transfer the shopping cart back to BobcatBUY.

6. If you do not purchase an item and would like to return to BobcatBUY, close the supplier’s website window, and click the Cancel Punch-Out button.

XX. Move Items To A New Cart Or An Existing Cart

Move Items To An Existing Cart
This action moves the product information as well as any explicit line-level settings.

1. Click in the select boxes to the right of the line items that you want to Move.

2. In the For Selected Line Items drop-down menu, select Move To Another Cart, and

3. Click Go.
4. Click in the Select radio button next to the recipient cart that will receive the new item.

5. Click Move.

6. A message “The Lines(s) has been successfully moved” appears. Click Close.

7. The selected item is now removed from the existing cart and will appear in the recipient cart.

**Move Items To A New Cart**

1. Click in the select boxes to the right of the line items that you want to Move.

2. In the For Selected Line Items drop-down menu, select Move To Another Cart, and

3. Click Go.

4. In the Move to new cart section, Select the Move to new cart radio button.

5. Click Move.
6. A message “The Lines(s) has been successfully moved” appears. Click Close.

7. The selected item is now removed from the existing cart and will appear in the new cart.

8. The new cart is listed under the section labeled My Drafts under Shop>My Carts and Orders>View Draft Shopping Carts>My Drafts.

9. Click on the Shopping Cart Name. The shopping Cart summary screen opens.

10. Rename the Cart Name.

11. Next either click the Home icon to add more items to your new cart, or

12. Click Edit Requisition to process your Shopping Cart.

**XXI. Change Supplier For Non-Catalog Items & Forms**

Select this action to change the Supplier on all of the selected lines. The supplier can be changed for Non-Catalog Items and Forms where the supplier is not predefined. The supplier can only be changed if the supplier provides the type of item being purchased. An error message will be displayed if you try to change to a supplier who does not accept orders for non-catalog items.

1. Open the Shopping Cart that contains the Non-Catalog Item or Form for which you want to change the Supplier.
2. In the **Supplier/Line Item Details** section of the Requisition, click in the check box to the right of the **Non-Catalog Item or Form** for which you want to change the **Supplier**.

3. In the **For Selected Line Items** drop-down menu, select **Change Supplier**

4. Click **Go**

5. **If you know the Supplier name**, enter the **Supplier**

6. Click on the auto-populated selection for the appropriate supplier.

7. Click **Save**.

8. **If you need to search for a Supplier**, click **Supplier Search** link

9. Enter the name of **Supplier**

10. Click the **Search** button.

11. Click the Select link for the desired **Supplier**.

12. Click **Save**.

13. Now click **Save** to save the Shopping Cart Summary screen.
XXII. Add To Draft Cart Or Pending Requisition/PO

This option allows users to add the selected item to their draft or pending requisition/purchase order.

1. Select the **Shopping Cart** that contains the item that you want to add to *Draft Cart Or Pending PR/PO*.
2. In the **Supplier/Line Item Details** section of the Requisition, click in the check box to the right of the line item that you want to add to a *Draft Cart Or Pending PR/PO*.
3. In the **For Selected Line Items** drop-down menu, select **Add To Draft Cart Or Pending Req/PO**.
4. Click **Go**.

5. Click the radio button next to the recipient cart.

6. Click the **Add To Draft Cart Or Pending Req/PO** button.
7. An “Added Successfully” message displays.

8. Click Close.

XXIII. Assign The Shopping Cart

When you are finished shopping, you may **Edit the Requisition** then **Assign the Cart**. In some departments, you may only need to shop, then Assign the Cart, and your Requester will **Edit the Requisition**. All three roles - Shopper, Requester, and Approver - have the authorization to edit the requisition. You may edit the requisition to verify/correct **Shipping Address**, **Cost Center**, **Natural Account Code**, and **Account Code Splits**, etc. For further instructions on editing the requisition refer to the table of contents.

If a shopper chooses not to edit the requisition when it is assigned, the **Requester or Approver** must complete the editing of the requisition before the system will allow the requisition to be submitted. Usually the cart is assigned to a **Requester**. In some cases the **Requester** and the **Approver** is the same person in your department. The **Requester or Approver** will edit the requisition and submit it. Next the **Approver** reviews the requisition (only if it is > $1500) for processing (Approve, Reject, Return, etc). If approved, the requisition travels through various other approval paths in order to be turned into a **Purchase Order**. Finally, the purchase order is sent to the **Supplier** and the encumbrance is sent to Oracle Financial Management System.

1. In the active **Shopping Cart**, click the **Edit Requisition** button at the top right.
2. Verify/correct all of the information on the requisition
3. Click the **Assign Cart** button.
4. The **Assign Cart** window opens. The user has three ways to select an assignee;
   a. **Allow the default assignee (if setup in User Profile)**
   b. **Select from Profile Values** (if multiple assignees were setup in User Profile)
   c. **Search for an Assignee** from all assignees listed in the BobcatBUY system. See an example of all three processes next.

5. A default value will be entered from the User Profile, if one was setup by the user.
   a. If appropriate, you can add a descriptive note with instructions for the cart assignee. The note is included in the email notification to the assignee and also saved in the **History** of the document.
   b. Click the **Assign** button.

6. If multiple assignees are available, you can select from the list of **Profile Values**.
   a. Click the **Select from Profile Values** link.
   b. Choose the appropriate **Assignee** from the drop-down list. The selected user will now appear in the **Assign Cart To** field.
c. You may enter a *Note* for the *Assignee*. The *Note* will be included in the email notification sent to the assignee.

d. Click the *Assign* button.

7. You also have the ability to select an *Assignee* from your *Organization*.
   a. Click *Search For An Assignee* link. A *User Search* window will open
   b. Enter a value in any of the search fields: *Last Name*, *First Name*, *User Name*, *Email*, or *Department* to search for the appropriate assignee.
   c. Click the *Search* button.

**NOTE:** The wildcard “**” may be used as a filler to search for data when you don’t know the exact wording on all or part of a name. You may also expand the number of results per page that will display by clicking in the drop-down box and choosing a higher number.

d. The results will display.
e. Click the **Select** link next to the appropriate **Assignee**.

![Select Assignee](image)

f. The selected user will now appear in the **Assign Cart To** field.

g. You may enter a **Note** to be sent to the assignee. The **Note** will be included in the email notification sent to the assignee.

h. Click the **Assign** button.

![Assign Cart](image)

8. Your cart has been successfully assigned.

9. 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.
10. All your active shopping carts are listed under **Shop Menu icon** > hover over **My Carts and Orders** > **View Draft Shopping Carts**. The Active Carts are displayed under **My Drafts**. Once you have assigned your cart, it will be displayed in the **My Drafts Assigned to Others** section. It will be displayed there until the Requester reviews the cart and clicks the **Submit Requisition** button. At that time you will find your shopping cart (that now has been turned into an official requisition) in the **Orders & Documents Menu icon** > hover over **Document Search** > **Search Documents** > **My Requisitions** link located under the search engine.
XXIV. Auto-Email Messages Sent By BobcatBUY

1. You will receive an email message when you assign your cart.
   When you assign your cart, you will receive a copy of the email message (from the system), sent to the person to whom you assigned your requisition.

   A shopping cart has been assigned to you
   support@selectquest.com
   Fri, Oct 23, 2010 10:09 AM
   Re: A shopping cart has been assigned to your Cart Name: 2010-11-23 glnshopper 01 Prepared for: Gina Shopper Prepared by: Tanya Hire
   Dear Tanya Hire,
   A shopping cart has been assigned to you by Gina Shopper (rider@ohio.edu). The shopping cart can be accessed for review in "Draft Carts" or by selecting the link below.
   If applicable, the user has submitted the following additional comments:
   
   If you have any questions with regard to this shopping cart, please contact your SelectSite Support Team.
   Support Team Contact Information:
   +1 (740) 553-1600
   procurement@ohio.edu
   
   Thank you,
   Ohio University

2. You will receive an email message when your assignee submits/approves your cart.
   When your Cart Assignee edits and/or submits the requisition for approval, you will receive two emails. One will inform you that your cart has been submitted by the cart assignee. The other will inform you that your requisition has been submitted to your organization’s workflow process for review.

   Your Assigned Requisition has been Submitted for Approval-Requisition#: 480107
   support@selectquest.com
   Fri, Oct 23, 2010 10:30 AM
   Re: REQUISITION SUBMITTED FOR APPROVAL #: 480107 Cart Name: 2010-11-23 glnshopper 01 Prepared for: Gina Shopper Prepared by: Tanya Hire
   Dear Gina Shopper,
   Your assigned shopping cart ’2010-11-23 glnshopper 01’ has been submitted for processing by Tanya Hire (blaber@ohio.edu).
   Your cart will be processed using the rules that apply to your organization, if any.
   If you have any questions with regard to this shopping cart, please contact your SelectSite Support Team.
   
   Support Team Contact Information:
   +1 (740) 553-1600
   procurement@ohio.edu
   
   Thank you,
   Ohio University

3. You will receive an email message when your cart has been submitted to the organization’s workflow process for review. This occurs after the assignee of the cart submits the requisition.

4. You will receive an email message when your requisition has been approved and a purchase order has been created.
5. You will receive an email message when your purchase order has been submitted to the organization’s workflow process for review.

6. You will receive an email message when your invoice has been submitted to the organization’s workflow process for review.

The Assigned Cart Reminder Email Notification
An email reminder will be sent for draft shopping cart Assignees and Shoppers. Emails will be sent at regularly scheduled intervals as a reminder there are carts that have not been processed and require attention. Both Shopper and Requester will receive an initial reminder email 4 days after the draft cart was originally assigned. A follow-up email reminder will be sent to both the Shopper and 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 the cart and they may contact the Requester to inquire.
Other Workflow Email Messages:
- You will receive an email message when your cart has been submitted to the organization’s workflow process for review. This occurs after the assignee of the cart submits the requisition.
- You will receive an email message when your requisition has been approved and a purchase order has been created.
- You will receive an email message when your purchase order has been submitted to the organization’s workflow process for review.
- You will receive an email message when your invoice has been submitted to the organization’s workflow process for review.

XXV. Recall (Retrieve) The Cart After It Has Been Assigned

You may Unassign the cart if you need to make changes to it. You may Unassign the cart only until the Assignee has submitted the cart (which is most often your Requester, but may be your Approver, if your department is small).

1. To access the Shopping Cart, click the Shop Menu icon > hover over My Carts and Orders > View Draft Shopping Carts > My Drafts Assigned to Others section.

2. Click the Unassign button.

3. Click the Edit Requisition button and edit the cart.

4. After the cart has been updated click Assign Cart. Click Assign.
XXVI. Where Are My Shopping Carts?

To access all of your Draft Shopping Carts, click the Shop Menu icon > hover over My Carts and Orders > View Draft Shopping Carts > My Drafts.

Your shopping carts will be listed by Cart Number (requisition number), Shopping Cart Name, Date Created, Cart Description, and Total.

To access your Draft Carts that have been assigned to a requester, click the Shop Menu icon > hover over My Carts and Orders > View Draft Shopping Carts > My Drafts Assigned To Others.

XXVII. How Do I Find My Shopping Cart Once It Has Become A Requisition?

Once the Requester submits your requisition to the Approver, you may search for your requisition via three different locations.

1. Click the Orders & Documents Menu icon > hover over Document Search > Search Documents > My Requisitions. Your Requisitions will be displayed in a list sorted by date.
2. For other users, to open the requisition, click on the Orders & Documents Menu icon > hover over Document Search > Search Documents, Choose Requisition in the Search field, enter the Requisition Number and click Go.

3. Click the Requisition Number to open and view it.

4. When the requisition displays, click the History tab. All Comments and History will display.

The requisition may be pending, completed, withdrawn, returned, or partially rejected, or rejected. You may view a list of your requisitions by Requisition No., Supplier, Requisition Name, Requisitioner, Requisition Date/Time, and Requisition Total. Refer to the Document Search document for further information on searching for requisitions and using both the search terms and filters on the left side of the window.
**XXVIII. 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 the **Magnifying Glass** icon (top right). The Quick Search window is displayed.

3. 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.
XXIX. Actions For 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 > 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.

XXX. 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 the field, or press 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.

---

**XXXI. Add Comments And Attachments**

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**). See Approver’s process below.

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*, and click **Add Comment**.

8. The Comment appears in the Comments detail section. Any attachments are also displayed.

9. For **Shoppers** accessing a requisition (instead of a draft), **Requesters** accessing a requisition, or an **Approver** adding comments – The **Comment** box has added features:
Shopper, Requester, and Approver
Cart & Assign – v 14.2
Questions? Call 597-6446 or email financecustomercare@ohio.edu

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.

   ![Available Actions: Add Comment](image1)

   **Approvers:** Once the requisition is open, Add Comment is in the **Available Actions** drop-down list. An Approver must choose **Add Comment** and click the **Go** button.

   ![Available Actions: Add Comment](image2)

   b. Click on the **Comments** tab.
   c. Click **Add Comment** button.
   d. To send an email notification indicating that a *comment* has been added,
      1. Click the **checkbox** next to the user’s name.
      2. 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,
   g. Click the **Browse** button to navigate to where your file is saved.
   h. **Double-click** the file that you would like to *attach*, and
   i. Click **Add Comment**.

   ![Add Comment](image3)
The following information displays regarding the added comment.

10. An email is sent to all of the users specified to receive the notification.

```
Subject: Comment added to requisition 489776
To:请求人, 购物者, 批准人

Re: COMMENT ADDED TO REQUISITION #489776
Cart Name: 2010-12-15 ginasshopper 01
Prepared by: Gina Shopper
Prepared by: gina requestor

Dear gina requestor,

Gina Shopper has commented on Requisition 489776
Comment: I will copy this requisition to a new cart since I made a mistake on it.

To reply to this comment click on the following link
```

11. 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.
XXXII. 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 all 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 and saves valuable time toggling to different screens.

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.
XXXIII. 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 Save.

5. Click the Edit Requisition button. Edit the Requisition.
6. **Assign the Cart** (as Shopper) or **Submit Requisition** (as Requester).

**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 items in your cart are punch-out catalog items 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.*
- The supplier of the punch-out item does not support reordering from a previous punch-out request. (Line 1)
XXXIV. 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 > hover over Document Search > 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.
XXXV. 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. Click on Admin > View Draft Carts From Other Users.

2. Enter search criteria in any field to find a particular Draft Cart.

3. Click the Search button. Click on the Shopping Cart Name to open and view the Draft Requisition.
4. The summary view of the Draft Requisition is displayed.

![Summary View of Draft Requisition](image)

**Cart Name:** 2012-03-13 tranerseas 01  
**Description:** Normal  
**Prepared by:** Traner Seashop  
**Prepared for:** Traner Seashop  
**Accounting Codes values vary by line  
**Delivery Options:** Expedite  
**Seller:** Best Center-Best Way  

**PROJECT_TASK** | **FUND** | **FUND_TYPE** | **ORG** | **Accounting Codes values vary by line** | **Note to all Suppliers**  
---|---|---|---|---|---
PM2111003 | 130-5500-20100 | 130 | 5500 | 20100 | 311000  
**NATURAL ACCOUNT**  
**Labs, Research & Technology**

**Supplier / Line Item Details**

<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><strong>Shoppers</strong></td>
<td>2122131322</td>
<td>EA</td>
<td>25.00 USD</td>
<td>1 EA</td>
<td>25.00 USD</td>
</tr>
</tbody>
</table>
| **Commodity Code** | 529 | Laboratory/Medical Equipment & Supplies  
**Internal Note** | no note | Internal Attachments  
**External Note** | no note | Attachments for supplier |
| **VWR International** | 4620-00-90 | EA | 10.00 USD | 1 EA | 10.00 USD |
| **Commodity Code** | 529 | Laboratory/Medical Equipment & Supplies  
**Internal Note** | no note | Internal Attachments  
**External Note** | no note | Attachments for supplier |
| **Supplier subtotal** | 25.50 USD | |
| **Total** | | |

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**Shopper, Requester, and Approver**

Questions? Call 597-6446 or email financecustomercare@ohio.edu
XXXVI. 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, an audit trail is available through the History tab. Reviewing the History is a common way to track status and view an audit trail of events.

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.

To view detailed instructions, refer to the Shopping & Cart document (View The History).

XXXVII. View Approval Workflow Overvi

There are three different approval workflow processes in the system:

1. Requisition Approval Workflow,
2. Purchase Order Approval Workflow
3. 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).

- A cart is created, submitted, reviewed, and approved. Upon completion of the Requisition Approval Process, a purchase order number will be generated.
- 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.
- The item/service is received
- The Invoice is received by Accounts Payable staff and is entered into the system.
- Upon completion of the Invoice Approval Process, the Invoice is approved for payment.
- Notification is sent to Oracle to verify it is okay to pay the supplier
- 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 (Procure) Buying Ctr 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 sections below (The Requisition Approval Process, the Purchase Order Approval Process, and The Invoice Approval Process).

XXXVIII. Where Is My Requisition In The Approval Process?

You have the ability to view the approval workflow process the requisition must go through before being delivered to the supplier. If you have not been notified of a requisition being turned into a purchase order, you may view the approval process to determine where it has stopped in the workflow process. 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 status. 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, Account Number (Cost Center), Dollar Amount, Natural Account Code, and Form Type, etc. Additional details regarding the three different workflow processes are at the end of this section.

1. To view the Approval Workflow Process the requisition goes through before being delivered to the supplier, the Shopper, Requester, or Approver may open the Requisition and select the View Approvals tab.

2. Below is a sample of an Approval Workflow Process for a requisition. The requisition may or may not go through the following approval steps based on its unique identity.

3. **Mixed Orders/Forms Auto-Return** – A mixed order is when an internal request such as a Direct Payment Form is combined with a Blanket Purchase Order. It can also occur when you add a form plus other non-form items.
   a. A mixed order will flow through this step and be returned.
   b. Notification will be sent via two methods, the shopper and requester will both receive an email plus the requester will be notified via the Notifications link in the top banner.
   c. When the requester clicks on Requisitions - Returned (1), the returned requisition will display in the draft cart under the category My Returned Requisitions.
   d. At the same time, the requisition appears in the shoppers My Drafts Assigned To Others section. The shopper may also access the requisition and separate out the mixed order.
   e. To find out why the requisition was returned;
1. The requester must open the requisition by clicking on the **Shopping Cart Name**
2. The shopper must first click **Unassign** button, where it will then appear in their **My Drafts** section, then click on the **Shopping Cart Name**.
3. Click the **View Approvals** tab. The first step listed past **Submitted on behalf of...** is the **Mixed Orders/Forms Auto-Return**. This informs you that there is a mixed order and the form items must be separated from either other forms or from non-form items. *(Refer to the directions for **Move Items To Another Cart** in the Table of Contents.)*

### 4. Funds Available Validation

a. During the **Funds Available Validation** BobcatBUY checks the Oracle Financial Management System to verify that there are funds available in the particular **Cost Center(s)** charged on the requisition to accommodate the requisition expense.

b. If there is not enough money available in the cost center(s) charged on the requisition, the system will enter a **Note** in the **History** section of the requisition (click on **History** tab to access) as an information only notification. The message informs users that, “**WARNING: [Line 1]The Cost Center XXX does not have sufficient funds for this purchase.**”

c. The processing of the document will not stop except, in the case of a **Grant Account**. This message is to inform the approver of the status of the funds available in the cost center to aid in the approver’s decision making process.

d. **No auto-email message is sent in this step.**

e. On a **Grant Account** If a natural account number is used that is not an authorized natural account number for that particular grant, the requisition will be returned with an error.

f. A message will also be displayed in history for this transaction as well (see next section).

g. The Requisition Approval Workflow will show this step is approved even though the Cost Center check with Oracle verifies there are not enough funds available at that time to accommodate the expense.
5. **Grant Cost Center Returned Due To An Inappropriate Natural Account Code Used**
On a Grant Cost Center, that is charged fully or partially for the requisition expense, if a natural account number is used that is not an authorized natural account number for that particular grant, the requisition will be returned with an error. A message for this transaction will also be displayed in the history as well.

The shopper and requester will receive an email notifying them of the invalid natural account code. The shopper or requester must edit and add a valid natural account code or if the natural account code is accurate then the item may need to be charged to a different cost center that authorizes that particular type of purchase.

   a. Open the requisition
   b. Click **Edit Requistion** button
   c. Click on the **Natural Account** tab or **Cost Center** tab, whichever is appropriate
   d. Click on the **Edit** button in the Natural Account or Cost Center section, whichever is appropriate
   e. Enter the appropriate Natural Account or Cost Center, whichever is appropriate
   f. Click the **Save** button
   g. If you are the shopper, assign the Cart
      o Click the Assign Cart button
      o Click Assign
   h. If you are the requester you must Submit the Requisition again. Click the Submit Requisition button.

6. **Account Approver Missing** – This step will be triggered when the requisition is over $0.00 and an account approver must be setup. For instance, if a new cost center has been setup in Oracle FMS and the BobcatBUY system administrator has not setup the Approvers that match that particular Cost Center. This step will trigger a notification to the BobcatBUY system administrator.

7. **Dept. Acct. Approval** – This step will be triggered when a Project/Task does not have an Approver so the Dept Approval occurs from the Fund Type/Fund/Org approval.

8. **Dept. Manager Approval** – This step will be triggered when the Fund Type/Fund/Org requires approval and the Project field is null or nine zeros. This requisition will be reviewed and approved by the Fund Type/Fund/Org approver.
9. **Finance Approval (and Exempt from Finance Approval)** – This step will be triggered for a variety of conditions: foundation project, Grant project, OU Agency project, Plant Fund project, OUF Housing for OH projects, expenses over $1500 with other parameters, etc. This requisition will be reviewed by the appropriate office.

10. **OIT Review** – This step will be triggered when the requisition is greater than or equal to $600, the *Commodity Code* is 524 or 544, and it is a non-catalog item. This requisition will be reviewed and approved by an OIT staff member.

11. **EHS P-Listed Items** – This step will be triggered when the CAS number indicates a P-List item. This requisition will be reviewed and approved by an Environmental Health & Safety staff member.

12. **EHS Select Agents** – This step will be triggered when the product flag indicates the item is a select agent. This requisition will be reviewed and approved by an Environmental Health & Safety staff member.

13. **EHS RSC** – This step will be triggered when the product flag is radioactive, RAD Minor, or the *Natural Account Number* is 331500. This requisition will be reviewed and approved by an Environmental Health & Safety staff member.

14. **EHS Chemicals of Interest** – This step will be triggered when the CAS number indicates Chemicals of Interest. This requisition will be reviewed and approved by an Environmental Health & Safety staff member.

15. **EHS RAD Containing Devices** – This step will be triggered when the requisition has an item using a Rad Device *Commodity Code* of 585. This requisition will be reviewed and approved by an Environmental Health & Safety staff member.

16. **EHS Biohazard** – This step will be triggered when the requisition has an item using a Biohazard *Commodity Code* of 586. This requisition will be reviewed and approved by an Environmental Health & Safety staff member.

17. **EHS DEA Controlled Substance** – This step will be triggered when the requestor is ordering a DEA Controlled Substance and he does not have a valid DEA license or the license has expired. The DEA License checkmark and the expiration date is indicated in the *User Profile*. This requisition will be reviewed and approved by an Environmental Health & Safety staff member.

18. **LAR Approval Live Animals** – This step will be triggered when the *Natural Account Number* is 700700 which indicates a purchase of a live animal. This requisition will be reviewed and approved by a Laboratory Animal Resources staff member.

19. **Prevailing Wage** – This step will be triggered when the *Prevailing Wage* checkbox is checked or a *Prevailing Wage Natural Account* is selected. This step will be triggered when the *Natural Account Numbers* are between 971500 and 971800 or the *Natural Account Values* are one of the following: 611100, 612100, 920000, 930000, and 971000. This requisition will be reviewed and approved by the Procure to Pay Department, Prevailing Wage Coordinator.
20. **Buying Center Review** This step will be triggered when the requisition is a *Non-catalog Item*, and the dollar amount is less than $25,000 for all *Commodity Codes*. The requisition will be reviewed and approved by the Buyer responsible for that particular Commodity Code.

21. **Purch Operations Manager** — This step will be triggered when the requisition is greater than $25,000. The Assistant Director of Operations will review and approve this requisition.

22. **Strategic Sourcing** — This step will be triggered when the requisition is greater than $25,000. The buyer of the specific *Commodity Code* will review the supplier, item purchased, dollar amount, and then approve it.

23. **Ad Hoc Approvals** — This step will be triggered when a purchasing agent recognizes that an Ad Hoc approval is required and forwards the requisition to the appropriate approver. The requisition may be reviewed and approved by any of the following Ad Hoc approvers; EH&S, Finance, Grants, Legal, Legal & Tax, Tax & Payroll, Live Animals, OIT, Payroll, Planning, Printing, Transportation, and Vehicles.

24. **New Supplier** — This step will be triggered when the *Add New Supplier* form is submitted in the requisition. Once a Buyer approves the addition of the new supplier the requisition is moved to the Procure to Pay office staff. They will initiate the retrieval of all appropriate tax forms (Ohio Substitute W-9) if the shopper did and attach them to the Request for New Supplier form. Once the Procure to Pay office staff receives all appropriate tax forms and inputs them into Oracle, they will approve the requisition. The end user will receive an email that the requisition for *Add New Supplier* was approved. The end user now may shop using the New Supplier. **NOTE:** There is no *Purchase Order* created with this Form.

25. **Final Review** — This step will be triggered when the requisition is over $50,000. This requisition will be reviewed and approved by the Director of Procure to Pay.

26. **VPFA** — This step will be triggered when the requisition is over $500,000. This requisition will be reviewed and approved by the Vice President for Finance and Administration.

27. **Change Order Processing** — This step will be triggered when either the *Change Order Request* form or the *Close PO Request* form is submitted in the shopping cart. The Buyer will manually update the changes to the BobcatBUY and Oracle purchase order, and then approve this step. **NOTE:** There is no new *Purchase Order* created.

28. **Funds Available Validation** — This is the second *Funds Available Validation* assuming that the Cost Center totals may have changed since the first Funds Available Validation occurred at the beginning of the workflow process. This step will check to see if there are funds available in the Cost Center to accommodate the requisition expense. If not, the requisition will still flow through the process, however, a message will be returned in the history of the requisition as an “information only” notification. No email notification is sent in this step. **NOTE:** If a grant account is entered as the *Cost Center* and a *Natural Account* code is used that is not authorized for the grant, the requisition will error out and will be returned back to the requester.

29. The Purchase Order is created.
XXXIX. View OU’s Purchase Order Terms And Conditions

All Purchase Orders are subject to Ohio University’s standard Terms and Conditions which are incorporated by reference and made part of each Purchase Order. Each Purchase Order also refers to the Terms and Conditions. The Terms and Conditions can be found on Ohio University’s website at http://www.ohio.edu/finance/purchasing/upload/TERMS-AND-CONDITIONS.pdf

XL. The Purchase Order Approval Process

This process starts when the Purchase Order Number is created.

1. To view the Approval Workflow Process the purchase order goes through before being delivered to the supplier, the Shopper, Requester, or Approver may open the Purchase Order and select the PO Approvals tab. You may see the following approval steps:
2. Revise PO — This step creates the purchase order documents that will go to the supplier and to Oracle FMS.
3. PO Distribution — This step initiates the distribution of the purchase order to the supplier, whether by fax or electronic submission. A purchase order is not sent for a Direct Payment form.
4. Send PO Export — This step exports the purchase order information to Oracle FMS.
5. AP Invoice Create — This step creates the Invoice for a Direct Payment form. Procure to Pay office staff will create the invoice and approve this step.
XLI. The Invoice Approval Process

This process starts with the Invoice created by AP or an electronic invoice received by the supplier (manual invoice or electronic invoice).

1. To view the Approval Workflow Process the invoice goes through before being paid, the Shopper, Requester, or Approver may open the Invoice and select the Approvals tab. You may see the following approval steps;

2. Purchasing Review – This step will be triggered if Procure to Pay staff requests Commodity Manager input or review on the invoice prior to the Auto-Match step.

3. Services – Two-Way Match – This step will be triggered if the document total is greater than $500 but less than $10,000, and the Natural Account is 179000, 184000, 185900, 186000, 189000, 971500, 971800, 611100, 612100, 920000, 930000, and 971000. The purchase order is matched to the invoice and will be routed back to the owner of the purchase order, which is usually the requestor.

4. Approve An Invoice for All Direct Payments and Purchase Orders equal to or greater than $10,000. This process includes ≥$10,000 and all Natural account codes.

5. Auto-Match – This system will set the match status and tolerance status.

6. Match Exceptions w/Buyer Or With No Buyer – If the invoice is unmatched it will route to a buyer who originally approved the requisition or a buyer based on its Commodity Code.

7. Ad Hoc Approval – This step will be triggered when a Procure to Pay staff member recognizes that an Ad Hoc approval may be required. The invoice may be reviewed and approved by any of the following Ad Hoc approvers; EH& S, Finance, Grants, Legal, Legal & Tax, Legal, Tax & Payroll, Live Animals, OIT, Payroll, Planning, Printing, Tax, Tax & Payroll, Transportation, and Vehicles.

8. Prevailing Wage – If the Prevailing Wage checkbox was checked on the requisition by the shopper or requester than this step will be triggered. This step will also be triggered when the Natural Account Numbers are between 971500 and 971800 or the Natural Account Values are one of the following: 611100, 612100, 920000, 930000, and 971000. Before the invoice can be approved to pay the Prevailing Wage Coordinator must verify that all documents have been received and are in order.

9. Plant/Grant Accounting – This step is triggered if the requisition includes natural account number 797000 or 797100.

10. Ok To Pay – The BobcatBUY system queues the Invoice for export.