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I. Welcome Message

On Ohio University’s home page, click the Faculty/Staff button. Select the BobcatBUY link (bottom left) and enter your Ohio ID and Password, and click I Agree.

NOTE: Upon initial login you will be asked to accept Terms and Conditions/BobcatBUY User Agreement. Read the agreement and click Accept.

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

To logout of BobcatBUY, click the black Logout button (right side of screen, under the quick search link) or click on your Name (top right) and click Logout.
II. BobcatBUY Roles Defined

Shopper
All roles in BobcatBUY may shop. A Shopper creates the shopping cart (requisition) and
1. If the person is a Shopper only, s/he will assign the cart to her Requester.
2. If s/he is shopping as a Requester, s/he will submit the requisition. Only requisitions ≥ $1,500 will go to the Approver.
3. If s/he is shopping as an Approver 1, she will submit the requisition. Only requisitions ≥ $5000 will go to the Approver 2. Other staff may be designated as an Approver 2, but this role is commonly assigned to the Budget Unit Manager.

Requester
As a Requester, you must review all shopping carts assigned to you from those in your approval chain. The Requester approves all shopping carts (requisitions) up to $1,499.99. Once the Requester submits the requisition it will move into the workflow but will not flow to a department approver. If the Shopper did not edit the requisition, you may add/update information such as Ship To address, Cost Center (account number), Account Splits between cost centers, add Comments, and add internal/external Notes and Attachments, etc. When a Shopper assigns a cart to you, an email is automatically sent to notify you of the pending shopping cart (requisition). As a Requester, you may approve purchase requests (submit the requisition) from Shoppers up to $1,499.99 and self-approve your own purchases up to $1,499.99. You process all carts assigned to you as the Requester, no matter what the dollar amount of the shopping carts (requisitions). Once you click the Submit Requisition button, it will be processed with your approval, if up to $1499.99 or it will move on to the approval folder if over $1499.99. Your review and editing of the shopping carts (requisitions) is still an essential part of the processing for shopping carts (requisitions) at any dollar amount.

Approver 1
As an Approver 1, you must review purchase requests (requisitions) from those in your approval chain between $1,500 and $9,999.99. You may also receive shopping carts (requisitions) assigned directly to you. As an Approver, you will be listed as one of several Approvers for a specific Cost Center (account number); any requisition with items charged to this particular account number will automatically be routed to you by the system.

When a Shopper assigns the shopping cart (requisition), an email is automatically sent to the Shopper and the Requester. When a Requester submits a requisition over $1499.99, an email is automatically sent to notify you of the pending requisition. As an Approver 1, you may approve requests between $1,500 and $9,999.99 and self-approve your own purchases up to $4,999.99.

Approver 2
As an Approver 2, most commonly the Budget Unit Manager reviews purchase requests ≥ $10,000.
III. Methods For Shopping In BobcatBUY

Click the **Homepage** icon located in the Main Menu Banner to the left of the screen.

**BobcatBUY** offers three (3) methods for locating and procuring products: **Hosted Catalog**, **Punch-out Catalog**, and **Non-catalog Item**.

Hosted Catalog, Punch-out Catalog, and Non-Catalog Item purchases can be stacked into one cart. There will be one requisition number for all of the items; however, separate purchase order numbers will be issued for each unique supplier.

**WARNING:** When completing a form, each form should be created in a NEW shopping cart. The only exception is when you are completing a Direct Payment Form to a supplier whose invoice contains more than one expense type that must be coded to a unique Natural Account Code. In this case, multiple copies of the Direct Payment forms made payable to the same vendor using the same invoice must be included in the same shopping cart.

**NOTE:** If you submit a non-catalog item with a punch-out and/or hosted catalog item, and you need the punch-out or hosted catalog item quickly, it is recommended that you submit the non-catalog item in a separate cart, because the non-catalog item must flow into additional purchasing workflow processes, thus it will slow down the entire order.

**Shop From A Hosted Catalog**

A hosted catalog is an online version of the supplier's items included in Ohio University’s contract. Hosted catalogs contain item descriptions, part numbers, pricing, and images of the items (if provided by the supplier).

The shopping experience with hosted catalogs has a consistent look and feel regardless of the supplier. The search criteria are the same, carts look the same, and the overall functionality is the same across suppliers.

When using the BobcatBUY search features, all hosted catalog items are searched, so results may include items from multiple suppliers. Item comparisons can be performed side-by-side between suppliers. Results may also contain products from Level II Punch-Out suppliers. Those products will include an “Order from Supplier” link to initiate the purchase process via the supplier’s web page created specifically for Ohio University.

Prices in hosted catalogs are relatively stable. Suppliers submit price files to Ohio University when prices are updated, items are discontinued, and/or new items are added (quarterly and annually).

**Shop From A Punch-Out Catalog**  
**Your Internet Browser Must Be Set To Allow Pop-Ups.**

A punch-out catalog is an integrated external link to the supplier's web page created specifically for Ohio University. The items reflect University discounted prices; however, the items and
pricing may change more frequently than a hosted catalog. A punch-out catalog may allow you to configure certain items (depending on the supplier) and take advantage of Ohio University's discounted price.

The search feature is supplier specific, so if you are familiar with a supplier's public website, the punch-out catalog functions will be the same. The cart functionality, adding an item, editing a cart, managing favorites, and returning the punch-out cart to the BobcatBUY site is unique to each punch-out catalog supplier’s site.

You are not able to compare prices between punch-out suppliers and hosted catalogs, but most punch-out catalog suppliers allow you to compare items within their own supplier site. When you are finished shopping in a Punch-Out Catalog, you must click a link to transfer your items back to BobcatBUY in order to complete your transaction.

**NOTE:** To modify an item after transferring your shopping cart to BobcatBUY, click the MODIFY ITEMS link. Make your changes in the Punch-Out Catalog, follow the supplier’s steps to Update the cart, and return to BobcatBUY.

**NOTE:** OfficeMax delivers to Ohio University (Athens campus) three-days/week: Monday, Wednesday, and Thursday.

**Shop Using A Non-Catalog Item**

Non-catalog items should be entered when you cannot find the item in a hosted or punch-out catalog, or when items are very new to the market and/or have not been added to the catalog yet. You may also use this form to request one-time services that will not be entered on a Blanket Order or a Service Agreement Purchase Order.

**NOTE:** The supplier must be an existing BobcatBUY supplier.

**Shipping and Handling:** If a non-catalog item includes shipping/handling and/or you want to estimate a shipping/handling charge for any other purchase, you must add it separately to the same cart using this form. For further instructions see the section labeled; Non-Catalog Item, Shipping and Handling section.

All Non-catalog Item orders route to Procure To Pay in the approval workflow. If your item is needed ASAP, set the Priority as Urgent when you edit your shopping cart. Procure To Pay will review it following your department’s Requester and/or Approver.
IV. Browse Suppliers

1. To determine if a particular supplier is in BobcatBUY, click the **Homepage** icon located in the Main Menu Banner to the left of the screen.

2. Under the **Simple/Advanced Search** field, click the **Suppliers** link. (This is a small, text link located above the **Preferred Suppliers** area.)

3. Click the **+ Click To Expand Search For Supplier Filter** button.

4. Enter the **Name of the Supplier** in the Supplier field and click the **Search** button. Entering less text is more preferable to obtain the appropriate results. Sometimes the supplier name is not entered in the system exactly as you enter it. For instance, in the example below “Biotage” is entered to obtain the results for **Biotage, LLC**. If “Biotage Incorporated” had been entered in the search field, it would not have yielded any results since the supplier is entered as “Biotage, LLC.”

   ![Search For Supplier](image)

   The results are displayed in the window below.

   You may enter any part of a supplier name. If you don’t know exactly how to spell the supplier name. You may also enter the beginning letter of the supplier name, such as “B.” All of the suppliers that begin with the letter “B” will display in the search results.

   You may also search for a group of suppliers by their **Supplier Type** (All (default), Hosted Catalog Suppliers, Punch-out Suppliers, Non-Catalog Suppliers). Click on the appropriate **Supplier Type** and click on the **Search** button. All of the suppliers for that particular supplier type will be displayed in the results.
5. Click on the name of the supplier to access contact information provided by the supplier. The search results now display the legal company name including the DBA.

6. Once you have verified your supplier is in BobcatBUY then you may begin shopping. You may start searching for your items via this window or go back to the Homepage tab to shop. If you choose to shop from this window you may click on the icon to the right of the supplier name.

Icons listing Supplier Type are listed to the right of the supplier name. There are Non-Catalog, Hosted Catalog, and Punch-Out Catalog icons.

- This is the Non-Catalog icon. When you click on it, it opens the Non-Catalog Item form. You may only shop for items from this supplier via the Non-Catalog Item form because the supplier is not listed as a Hosted Catalog or Punch-out Catalog.
- This is the Hosted Catalog icon. You may shop for this supplier via the Homepage. Click on the Hosted Catalog icon, a new window is displayed with the supplier contact information and a list of product categories specific to the particular vendor.
• If you click on the **category name** it will display subcategories filtering down until you can view actual products.

![Category Search](image)

- **Cell Biology** > **Cell Biology Kits** > **Prostaglandin Purification**
  - **Prostaglandin Purification**

• Click on the **View** link and it will take you to the Homepage with this product listed in the search results. It is ready to add to your cart. You may also use the **Filter Results** displayed to the left of the product results to help refine your product search further.

![Filter Results](image)

• Or you may click directly on the **view (incl. sub-categories)** link to take you directly to the Homepage page with all the products listed in the search results ready to add to your cart.

![View Link](image)
• This is the **Punch-Out Catalog** icon. You may shop for this supplier from this window or via the icon on the Homepage page (only if it is listed as a preferred supplier).

![Catalog Icon]

<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Type</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDWG</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• Click on the **Punch-Out Catalog** icon. When accessing a punch-out supplier, you will automatically be transferred to the punch-out supplier’s website. See the instructions listed later for Punch-Out Supplier.
V. Supplier Management

The Supplier Management search option is available as an additional resource to view supplier profiles and to determine if a particular supplier is in BobcatBUY.

NOTE: You can also do a simple search using the Quick Search feature. Access Quick Search from the top banner or by using the Alt + Q quick key combination.

Click on the Supplier Management icon located in the Main Menu Options Banner to the left of the screen. Click on the Search For A Supplier link.

For A Simple Supplier Search:

The search results now display the legal company name including the DBA.

1. Enter the Name of the Supplier in the Search field and click the Go button. Entering less text is more preferable to obtain the appropriate results. Sometimes the supplier name is not entered in the system exactly as you enter it. For instance, in the example below “Biotage” is entered to obtain the results for Biotage, LLC. If “Biotage Incorporated” had been entered in the search field, it would not have yielded any results since the supplier is entered as “Biotage, LLC.”

2. Icons listing Supplier Type are listed to the right of the supplier name. See previous section for descriptions of Supplier Types.
3. To view the Supplier Profile, Click the Manage button, scroll down and click on View Supplier Profile link, or click on the Name of the supplier.

4. The Summary tab displays basic supplier info; supplier name, ID, number, status, contacts, payment method, default fulfillment address, remittance address, and PO clauses, if any.

5. The General tab displays various supplier-level information.

6. The Addresses tab displays the fulfillment center, physical address, and remittance address. To view specific details, click on the appropriate Address link.
7. The **Contacts** tab displays contact information for each address type.
8. The **Fullfillment Centers** tab displays locations or divisions within a single supplier record. For example, there may be a local supplier that has five locations in your area. Each individual location can be represented on this tab. Within each fulfillment address type the system displays general, ordering, and history information.
9. The **Item/Price** tab displays price sets available to the organization.
10. The **Showcase/Classic** tab displays a checkbox if the supplier is listed on the Homepage page in the Preferred Supplier section.
11. The **Integrations** tab displays punch-out settings, integration settings, and supplier invoice item matching.
12. The **Configuration** tab displays shopping configuration and product search configuration.
13. The **Price File Approvers** tab displays information for the administrative purposes.
14. The **History** tab displays an audit trail of updates made to the supplier profile.

**For An Advanced Supplier Search:**

Click on the **Supplier Management** icon located in the Main Menu Options Banner to the left of the screen. Click on the **Search For A Supplier** link.
1. Click the **Advanced Search** link.

2. Enter the **Name of the Supplier** in the Search field and click the **Search** button.

3. You may also search by **Supplier Type**. You may search for a group of suppliers by their **Supplier Type** (All, Hosted Catalog Suppliers, Punch-out Suppliers, Non-Catalog Suppliers). Click on the appropriate **Supplier Type** and click on the **Search** button. All of the suppliers for that particular supplier type will be displayed in the results.

4. You may also search by **Class** to narrow down specifically, Science Catalog Suppliers. Click on the Supplier Class, if applicable, and click on the **Search** button.
5. You may search by the **Status** of the Supplier; All, Active, or Inactive suppliers. Click on the Status and click on the **Search** button.

![Search](image)

6. You may also search by **Diversity Classifications** of the Supplier. Click on the magnifying glass icon. Click in the box to the left of each Diversity Classification to select your search criteria. Next, click the **Add** button.

You may use any combination of the search fields to produce your specific supplier search results.

**VI. Deposit or Prepayment Is Required—How Do I Process?**

The **Shopper** must notify the supplier to request an invoice if a deposit or prepayment is required (hotel or conference reservation). You may **attach** the invoice (for the required deposit) to the shopping cart/requisition.

You must also add a comment to the shopping cart/requisition indicating that you will pick-up the requested deposit or prepayment from the Procure-To-Pay Office. Add your phone number so that the Procure-To-Pay staff will call you when the check is ready.
VII. Hosted Catalog Search

**Product Search** is accessed from the **Homepage** icon located in the Main Menu Banner to the left of the screen. It provides you with options to perform a quick product search or a more advanced search using additional search criteria.

A **Simple Search** is similar to a “Google” search, where a *word, phrase, or keywords* are entered into a single text box for searching. Simple searches can be performed across all product categories or for a specific product category.

An **Advanced Search** allows you to search for products by *keywords, Part Number (SKU), Supplier, or Manufacturer Name*.

The ability to *Browse* by **Suppliers, Categories, Contracts, or Chemicals** is accessed from the links directly below the **Simple/Advanced Search**.

1. To begin **Shopping**, enter the keyword for the product to be purchased in the **Search** field and click **Go**.
Only products that match the search criteria will display. Each match will include Supplier Name, Catalog Number, Product Description, Price, other miscellaneous information, and sometimes a picture of the product.

2. To sort the results, click the Sort By drop-down list and select the desired feature. You may sort by Best Match, Part Number, Description, Size, Packaging UOM, Supplier, and Price. The products listed on the next page are sorted by Price: Low to High.

NOTE: The Price: Low to High or Price: High to Low feature will only work if your displayed results are 200 or fewer. You will have to refine your results if you want to use that particular sorting option. A pop-up will display that message if your results are over 200.

NOTE: You may click on the product description to view more product details and the contact information for the supplier.

3. You may Add Keywords on the left side of the page and click Go.

If the item that you are looking for does not appear in the search results OR if the list is too large, you may refine your search by adding additional keywords. You may also add more specific search terms using Advanced Search.
4. In addition, you may refine the search results by using the **Filter Results** section on the left side of the page. Choose **By Supplier, By Category, By Packaging UOM, By Result Type, or By Manufacturer**.

Click on a specific **Supplier** and all matches for the selected supplier will display.

To return to the list with all suppliers in your original search results, under **Filter Results** click the **Show All** link.

**NOTE:** If your search returns more than 4000 results, the counts for each **Filter Results** option are not displayed. However, you may still select a refine search option. If you would like to see specific counts for each option, refine your search so there are fewer than 4000 results.
VIII. Add To Cart

Once the desired product has been located, you may add the item to a shopping cart.

1. The default quantity to be ordered is one (1). You may update this number to reflect your actual need.

2. Click the Add to Cart button. A message is automatically generated, showing the quantity added to the cart (located below the Add to Cart button). The items are also shown in the shopping cart Quick Link located at the top right of the Homepage screen.

IX. Access the Shopping Cart

You may access your shopping cart anytime while you are logged onto BobcatBUY. There are several ways to access your shopping cart.

1. Click on the Shop icon located in the Main Menu Banner to the left of the screen. Click on My Carts and Orders > Open My Active Shopping Cart. You may view the items in the Active Shopping Cart Summary screen.

2. Click on the shopping cart Quick Link located at the top-right of the screen. You may view the items in your cart from the My Cart screen or click on the View My Cart button to open the Active Shopping Cart Summary screen.
3. After you complete a Hosted Catalog search via the Homepage screen, and then add an item to your shopping cart, click on the # item(s) Added, View Cart link to open the active shopping cart.

**X. Add Prevailing Wage Checkbox**

If the requisition contains *Prevailing Wage* labor, the prevailing wage checkbox must be selected. The requisition will automatically route to the Prevailing Wage Coordinator for review.

1. Click on the *shopping cart* Quick Link located at the top-right of the screen. Click 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.

**XI. Hosted Product Comparison**

After completing the *Hosted Catalog Search*, you have the ability to compare multiple products within the search results.

Using the search criteria, *Beaker 125ml*, a result set is returned. Each line item has two (2) links located beneath the Add To Cart button.

1. To compare pricing and attributes for that particular product category, click Compare next to several items that you want to compare. A green check mark will appear next to the
items you selected and the word “remove” will be displayed. If you decide you don’t want to include a specific item in the comparison, click the Remove button.

2. After you have selected all the items for comparison, click the Compare Selected: # button at the top-right of the result set.

Based on the product category, comparable attributes and pricing will display. All the attribute descriptions will be displayed to the left of the products.

For Chemicals, Reagents, Lab Equipment, and Radiochemicals, additional information may be provided by the supplier, including Boiling Point, CAS Number, DOT Hazard Class, Molecular, and Weight, etc.

3. After comparing the selected products, you may add the desired item directly to the shopping cart by updating the QTY (actual amount needed) and selecting the Add To Cart button.
XII. Punch-Out Supplier

**WARNING:** Your internet browser must be set to allow pop-ups from this (BobcatBUY) site.

To access a Punch-Out supplier in BobcatBUY, click the **Homepage** icon located in the Main Menu Banner to the left of the screen.

1. Some **Punch-out** suppliers are included in the **Preferred Suppliers** section on the Shop window. Otherwise, click on the **Browse: Suppliers** link.
2. Click on the plus symbol to the left of **Click to expand Search for Supplier Filter**.
3. Click on the down arrow in the Supplier Type field and choose **Punch-Out Suppliers**. Click the **Search** button. All Punch-Out Suppliers are identified with a Punch-Out Supplier icon.
4. To access the Punch-Out Supplier, click on the **Punch-Out Supplier** icon.

When accessing a punch-out supplier, you will automatically be authenticated to the punch-out supplier’s website. As a result, you will not have to log in. The supplier’s website will recognize that you are from Ohio University and it will display the appropriate products and pricing with Ohio’s negotiated discounts. For a configurable item, such as a computer, a punch-out catalog is the preferred method for shopping. Dell and CDWG are two punch-out suppliers within BobcatBUY.

**NOTE:** The interface and functionality of punch-out shopping varies between suppliers.

For an example of shopping in a punch-out catalog; in the **Preferred Suppliers** section, click the **Dell** icon, and click the **Punch-out** link. The window will redirect to the supplier’s website. The Dell punch-out link will redirect you to **Dell’s Premier** website for Ohio University’s BobcatBUY.
Dell’s Premier page is similar to Dell’s public website. Most punch-out sites will be branded in some way to identify you as an Ohio University BobcatBUY user.

5. You may shop on the supplier’s punch-out site as usual. **Follow the supplier’s instructions to add items to your cart and submit your order.** The products that you buy through the supplier’s punch-out site will be returned to your BobcatBUY shopping cart for processing.

All necessary information regarding the product, including **Description**, **Catalog No.**, **Quantity**, and **Price** are returned electronically from the supplier back to your BobcatBUY cart. The punch-out catalog icon 🛒 will display in your active cart.
XIII. Modify A Punch-Out Catalog Item

1. To modify an item after transferring your shopping cart to BobcatBUY, click the MODIFY ITEMS link (located above the Product Description).

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

3. Transfer the cart back to BobcatBUY.

4. 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.

**NOTE:** It is not recommended to add punch-out items to Favorites because of the lack of control over pricing changes. For example, if you add an item from a punch-out supplier to your Favorites, and then add it to your cart later on, there is no guarantee the price is still accurate.

XIV. Non-Catalog Item

A Non-Catalog Item form should be entered if the Supplier is categorized as a Non-Catalog supplier. You must use the Non-Catalog item form to purchase products or services from this supplier. You may also complete the Non-Catalog Item form if you cannot find the item in a hosted or punch-out catalog. In addition, if items are very new to the market and/or have not been added to the catalog yet, you may use a Non-Catalog item form. You may also use this form to request services that will not be entered on a Blanket Order or a Service Agreement Purchase Order

**WARNING:** You must attach a Quote to a Non-Catalog Item purchase request. For a non-catalog item, it is assumed that you have either talked to the manufacturer/supplier or you visited their external website and you have obtained basic product information for the specific item you want to purchase.
Hosted, Punch-Out, and Non-Catalog items can be stacked into one shopping cart, however, the Non-Catalog Item will take longer to process. It is better if a Non-Catalog Item form is created in a NEW shopping cart.

WARNING: You must attach a quote from the supplier for a non-catalog item.

All Non-catalog Item orders route to Procure To Pay in the approval workflow. If your item is needed in a timely manner, please indicate that it is Urgent when you edit your shopping cart. Procure To Pay will review it first.

NOTE: It is recommended to order items via hosted or punch-out catalogs whenever possible. Non-catalog ordering requires additional approval steps.

1. Non-catalog items may be accessed any of the following ways:
   - To access a Non-Catalog Item Form in BobcatBUY, click the Homepage icon located in the Main Menu Banner to the left of the screen. Next, click on the Non-Catalog Item link located under the Hosted Catalog search field.
   - Click on the Shop Menu icon located in the Main Menu Banner to the left of the screen. Next, click on Shopping, then Go To: Non-Catalog link.
   - Click on the Shop Menu icon located in the Main Menu Banner to the left of the screen. Next, under Go To, click View Forms link. Click the Non-Catalog Item link at the top left-side of the screen.
   - You may also add a non-catalog item for suppliers where there are already items displayed in the cart. Click on the Add Non-catalog item for this supplier link. The Add Non-catalog Item window is displayed with the Supplier already selected. From here, skip to Step 3.
   - Click on the Browse: Suppliers link. Click on the plus symbol to the left of Click to expand Search for Supplier Filter. Click on the down arrow in the Supplier Type field and choose Non-Catalog. Click the Search button. All Non-Catalog Suppliers are identified with a Non-Catalog Supplier icon. To access the Non-Catalog Supplier, click on the Non-Catalog Supplier icon.

For the first four bullets, follow the instructions below starting with number 2. For the last bullet, follow the instructions below starting with number 4.
2. Enter the Supplier’s Name or click the Supplier Search link. The supplier must be preloaded in the system. When the supplier is selected, the preferred fulfillment center will default, but it can be changed by clicking the Select Different Fulfillment Center link. Click the Select link when the Supplier Name/Address window opens. If the appropriate Fulfillment Center is not available in BobcatBUY, you must initiate the supplier’s completion of the OHIO Substitute W-9 (former Payment Compliance Form), available online at: http://www.ohio.edu/finance/forms/financeforms.cfm

3. Scroll down and click Procure to Pay Forms. Next, click on the OHIO Substitute W-9. For specific details about the OHIO Substitute W-9, see the Forms long document.

4. Fill in all of the required fields for Product Description, Catalog No., Quantity, Price Estimate, and UOM (Unit Of Measure).

![Image of Shopping & Cart page](image_url)

**NOTE:** When entering a non-catalog item, you must choose the appropriate Classification, if applicable. This is the only way that Ad Hoc Approvals for non-catalog items with those specific classifications will be processed into their respective approval folders for tracking/reporting purposes. Examples of Classifications that need to be checked include: Controlled Substances, Recycled, Hazardous Materials, Radioactive, Rad Minor, Select Agents, Toxins, Energy Star, and Green.

5. **Commodity Code:** Click the Magnifying Glass button under the Commodity Code field. Click the Search button. Click the Select button for the appropriate commodity code.

Example: Commodity Code 529
6. Click the **Save And Close** button or click **Save And Add Another**, if you want to add another non-catalog item. Then enter information for all other fields for the next item starting with the product description field. Again, click the **Save And Close** button or click **Save And Add Another**.

7. The system will inform you if you have not entered required fields by highlighting the field with a yellow error message.

8. Click on the product **Description** or **More Info** link to open the Non-Catalog Item Form. Edit/enter the mandatory information then click **Save**. The system automatically adds the item to your active cart. See sample non-catalog item added to cart below.

![](image)

---

### XV. Add To Favorites

There are two types of **Favorites**: **Personal Favorites** and **Shared Favorites**. **Personal Favorites** are managed by each individual. In your **Personal Favorites**, folders and sub-folders can be created to manage your favorite items for future purchase. You have full control over items in your personal folders. **Shared Favorites** and folders are defined by the BobcatBUY system administrator. These items represent frequently ordered products or suggested products for purchase. The **Add To Favorites** option is located in several places in BobcatBUY.

1. Click the **Homepage** icon.

2. To begin shopping, in the **Search** field, enter the keyword for the product that you would like to purchase and click **Go**.

3. When the desired product is located, to add a product to your **Personal Favorites** folder, from the **Search Results**, select the **Add Favorite** link, located below the **Add to Cart** button.
4. A new window opens, allowing you to select the desired **personal folder** to which you will add the product.

5. **Edit Item Details** allows you to enter an **Item Nickname** for the product. This updated information is only shown in the **Personal Favorites** folder. The correct product name and description will appear in the shopping cart and will be transmitted to the supplier. You may also update the quantity.

6. **Select Destination Folder** allows you to add new folders and assign favorite products to new folders or existing folders.

You have a choice of creating a **New Top Level Folder** or a **New Subfolder** within an existing folder. To add a new top level folder,

1. Select the **New** button
2. Scroll down and click **Top Level Personal Folder**
3. Enter a **Name** for the folder, add an optional **Description**, and click **Save**.
4. Click **Submit** and click **Close**.

The item is added to the particular Top Level Personal Folder you just created.

To create a **subfolder**,

1. Click the **root folder** that will hold the subfolder and
2. Click the **New** button
3. Select **Subfolder of Selected Folder**
4. Enter a **Name** for the subfolder and add an optional **Description**
5. Click **Save**
6. Click **Submit** and click **Close**

The item is added to the particular Subfolder you just created.
To Add a Favorite to an existing Folder,
1. Select the Add Favorite link, located below the Add to Cart button.
2. Click the root folder, and click Submit button
3. Click the Close button
The item is added to the particular root folder you chose.

XVI. Access Favorites

1. To access the Favorites folder, click on the Shop icon located in the Main Menu Banner to the left of the screen. Next, click on Shopping, then click the View Favorites link.

2. Select the desired subfolder. All products added to this subfolder will display.

3. To add a product to your Shopping Cart, update the Quantity, and click the Add to Cart button.

NOTE: The product description in the Favorites folder displays the Item Nickname. Once the item is added to the cart, it will display the correct item name and description.

The dollar amount will increase in the Shopping Cart Quick Link located at the top right of the Homepage page.
XVII. Internal Notes and Attachments (Attach Quotes, Bids, etc.)

NOTE: A Note may be entered in the Header section of the requisition or in the Line Item Detail section for a specific line item. All invoices should be scanned and emailed to accounts.payable@ohio.edu. If you have a Purchase Order Number, be sure to include it on the invoice. Do not attach an invoice to a Purchase Order as Accounts Payable will not receive it.

1. In the Shopping Cart, click the Edit Requisition button, and click the Internal Notes And Attachments tab. Here you may enter free form notes or attachments that will be visible internally (OHIO staff only). These will not be visible externally (suppliers). These should be used for things like attaching the OHIO Substitute W-9, quotes, or multiple quotes/bids.

2. To add Internal Notes, click the Edit button. Enter additional information that is pertinent to your purchase request and click Save.

3. To add an Attachment, click the Add Attachment link.

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

5. Choose the “file to Attach”

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

7. Click “Save” when all files have been added.

8. To move attachments from Internal Attachments to External Attachments
   a. Click the drop down menu next to “remove” for the attachment to move.
   b. Select “Move to External Attachments”

9. To add a URL/Link, click the Add Attachment link. Under the Attachment Type drop-down list, select Link/URL. Enter a File/URL Name and the Link/URL. Click Save.

10. To remove an Attachment, click the Remove link next to the Attachment/URL that you would like to remove and click Remove.
XVIII. Shipping and Handling

If a *Non-Catalog Item* includes *Shipping and Handling* and you want to estimate the charge, you must add it separately to the same *shopping cart*.

1. To access a Non-Catalog Item Form in BobcatBUY, click the *Homepage* icon located in the Main Menu Banner to the left of the screen. Next, click on the *Non-Catalog Item* link located under the *Hosted Catalog search* field.
2. Enter the same *Supplier* as the *Non-Catalog Item* you are ordering.
3. In the *Product Description* field, enter “*Shipping and Handling*.”
4. In the *Catalog No.* field, enter “*Shipping*.”
5. In the *Quantity* field, enter “1.”
6. In the *Price Estimate* field, enter the *Shipping/Handling* *Quote* or *Estimate*.
7. For *Shipping/Handling*, enter the same *Commodity Code* that matches the item you are purchasing. Click the *Select* button for the appropriate commodity code.
8. Click the *Save and Close* button.

**NOTE:** When the cart is edited by the *Shopper* or *Requester*, a *Natural Account* must be assigned for each line item. When you assign a *Natural Account* to a *Shipping/Handling* charge, assign the same *Natural Account* as the *Non-Catalog Item* you are ordering.

XIX. Create A New Cart

You may want to *create a new cart* while you are waiting to complete an existing cart. You may create as many new carts as necessary.

1. Click on the *Shop* icon located in the Main Menu Banner to the left of the screen.
2. Hover over *My Carts and Orders*.
3. Click the *View Draft Shopping Carts* link.
4. To create a NEW cart, click the Create Cart button. A new shopping cart summary screen opens.

5. You may keep the default name assigned to the Shopping Cart or rename it. The default name is the current date followed by the user name and the number of the shopping cart/s added for the day. If you have two (2) shopping carts already created for 10-02, your next shopping cart would be named: 2013-10-02 your Ohio ID 03.

(current date) 2013-10-02 (your name) your Ohio ID (number of the shopping cart added) 03

11. To rename your shopping cart, highlight and delete the default name. Enter a new Name in the Cart Name field. You may also enter an optional Description for the shopping cart. Entering your own naming convention will be helpful if you order for several people and need to track your shopping carts by name or by definition of the products included in the cart.

12. The cart’s default Priority is Normal. To change the Priority, click on the down arrow and select Urgent from the drop-down menu. NOTE: The Urgent Priority should be used in moderation, otherwise Approvers may become desensitized to the label.

13. Click the Save button.

All your active shopping carts are listed under Shop Menu icon > My Carts and Orders > View Draft Shopping Carts > under My Drafts.
14. Click the desired **Shopping Cart Name** to open cart. Click on Home icon and start to shop.

XX. **Edit The Requisition**

When you are finished shopping, you may **Edit Requisition** or **Assign Cart**. All three roles - Shopper, Requester, and Approver - may edit the requisition. You must verify/correct the **Shipping Address, Cost Center, Natural Account Code**, and **Account Splits**, etc.

1. To access your **active shopping cart**, click the **shopping cart Quick Link** (top right). Click the **View My Cart** button.
2. To edit the requisition, click the **Edit Requisition** button (top right).
3. Verify/edit all of the information on the requisition (**Shipping Address, Cost Center, and Natural Account Code**, etc.).
4. Click the **Assign Cart** button.
XXI. Assign A Cart

If a shopper chooses not to edit the requisition, it must be assigned to a Requester or Approver. 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 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 at the same time the encumbrance is sent to Oracle Financial Management system.

To Assign The Cart/Requisition:
To get to the active shopping cart: In the active shopping cart, Click on the Shop Menu icon located in the Main Menu Banner to the left of the screen. Next, click the My Carts and Orders link, then click the Open My Active Shopping Cart link, and then click on the Shopping Cart Name. Another option to open the active cart is to click on the Active Cart button displayed in the top banner, then click on the View My Cart button.

1. Click the Assign Cart button at the top right.

2. 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 the Profile Values (if multiple assignees were setup in User Profile), or
   c. Search for an Assignee from all assignees listed in the BobcatBUY system.

3. 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.
4. If multiple assignees are available, you can select from the list of Profile Values. Click **Select from Profile Values**.

   ![Assign Cart](image)

   a. Choose the appropriate assignee from the drop-down list. The selected user will now appear in the **Assign Cart To** field.

   ![Assign Cart](image)

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

   c. Click the **Assign** button.

5. You also have the ability to select an **Assignee** from the **organization** list.

   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**.

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.
Your cart has been successfully assigned.

A confirmation page will appear summarizing the cart. Summary: Notes associated with the request, Requisition Number, Total, and Line Items. An email is sent to the Shopper, confirming submission and providing the Requisition Number. An email is also sent to the Assignee, notifying them of a pending requisition for review.

All your active shopping carts are listed under Shop icon > My Carts and Orders > View Draft Shopping Carts. The Active Carts are displayed under My Drafts. Once you have assigned your cart, it will display 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 > click Search Documents > and click the My Requisitions link located under the document search engine.
XXII. Recall (Retrieve) The Cart After It Has Been Assigned

If you decide you need to make changes to your cart you may do one of the following.

1. You may **Unassign** the cart only until the **Assignee** (which is most often your **Requester**, but may be your **Approver**, if your department is small) has submitted the cart to the Approver. When the shopping cart has been submitted, the cart becomes a requisition. Click the **Unassign** button. Make the necessary changes and reassign the cart.

2. You may ask your **Requester** to return the cart to you. Once the **Requester** has clicked the **Return Cart** button, your cart will be listed under **Shop** icon > **My Carts and Orders** > **View Draft Shopping Carts**. The returned cart becomes an active cart displayed under **My Drafts**. There will be a returned cart icon 🔄 located to the right of the shopping cart name. Click on the **Shopping Cart Name**, make the necessary changes and reassign the cart.

3. You can ask the **Approver** to return the requisition, which will be simultaneously returned to the **Requester** to appear in their **Drafts Assigned To Me** section and to the **Shopper** to appear in their **My Drafts** section. The **Requester** or **Shopper** can make the necessary changes and either **Submit The Requisition** or **Assign The Cart** dependent on which role edits the information.

4. Otherwise, you may only view the requisition via the **Orders & Documents Menu** icon > hover over **Document Search** > **Search Documents** > click the **My Requisitions** link located under the **document search** engine.

**NOTE:** It is recommended that you keep your auto-email and auto-notification settings enabled.
XXIII. Email Messages Sent By BobcatBUY

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

Re: A shopping cart has been assigned to your Cart Name: 2010-11-23 glnashopper 01 Prepared for: Glna Shopper Prepared by: Tanya Hire

Dear Tanya Hire

A shopping cart has been assigned to you by Glna Shopper (financecustomercare@ohio.edu). The shopping cart can be accessed for review in "Draft Carts" or by selecting the URL 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) 593-1900
procurement@ohio.edu

Thank you,
Ohio University

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

Re: REQUISITION SUBMITTED FOR APPROVAL # 480107 Cart Name: 2010-11-23 glnashopper 01 Prepared for: Glna Shopper Prepared by: Tanya Hire

Dear Glna Shopper,

Your assigned shopping cart ’2010-11-23 glnashopper 01’ has been submitted for processing by Tanya Hire (financecustomercare@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) 593-1900
procurement@ohio.edu

Thank you,
Ohio University

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.

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.
XXIV. A Requisition Is 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, Edit the cart, and re-Assign 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.

XXV. A Requester May Withdraw A Requisition (Returned By The Approver)

If you are a Requester, you may Withdraw the requisition.

1. To access the returned requisition, click the Shop Menu icon > My Carts and Orders > View Draft Shopping Carts > My Returned Requisitions section.

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

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

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

XXVI. Overview Of Actions 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.
XXVII. 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 comment 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**.

![Add Comment](image)

8. The comment appears in the comments detail section. Attachments are also displayed.

![Comments Section](image)

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:

   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](image)

**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](image)
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**.
The following information displays regarding the added comment.

![Comment Display](image)

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

   Comment added to requisition 489776
   support@sciquest.com [support@sciquest.com]
   Sent: Sunday, January 02, 2011 11:38 PM
   To: Rider, Gina

   Re: COMMENT ADDED TO REQUISITION #: 489776
   Cart Name: 2010-12-15 ginasshopper 01
   Prepared for: 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,
   a. Open the requisition.
   b. When the Requisition opens click the History tab. You will be able to view all of the History for this requisition.
   c. The following is displayed: Date/Time, Action, and the Comment/Note entered.
   d. To view the entire note, click More.
XXVIII. 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, 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 comments for all associated documents.
XXIX. 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 (top right), click on the drop-down arrow, select *Copy To New Cart*, and click *Go*.

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

3. Update the *Cart Name* on the shopping cart summary page.

4. Click the *Save* button.

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

![Image of Shopping & Cart interface](image)

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

![Image of Shopping & Cart interface](image)

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**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)

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*Shopping, Requester, and Approver*

Shopping & Cart v 13.3

Questions? Call 597-6446 or email financecustomercare@ohio.edu
XXX. 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.
XXXI. View The History (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 on the Requisition. 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 or for associated information for all document types. This provides the ability to see all related history on a single History tab and saves valuable time toggling to different screens.

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

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

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

2. When the Requisition opens, click the History tab.
3. By default only the comments/transactions for the open document are displayed. Use the filter to view any other associated documents.
   a. Click the + Click To Filter History button.

   ![Filter History Button]

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

   ![Filters Window]

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

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

   c. The **Action** drop-down field has five choices: Blank, Approvals, Modification, Integration, and Miscellaneous.
Blank - Will result in displaying all actions for the particular document/s.

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

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

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

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

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

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

4. Select the desired filters, and click the Apply button.

You will be able to view the entire History for either the specific document you have accessed or, if you used the filter, for the specific results based on the combination of filter choices. The History tracks and displays different columns based on your selections.

5. Under the Note column, if there is additional text, click More to view the entire note.
Below is an example of the History display for viewing history for only one document.

When viewing the History for All, a column labeled Applies To is added. This column lists the document name to which the specific row of History information applies.
XXXII. Requester Processes Your Returned Requisition From An Approver

After reviewing a requisition, an Approver may decide to return a requisition to the Requester because it requires additional information or revisions.

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

Your requisition has been returned. Requisition#: 492213

support@scquest.com [support@scquest.com]
Sent: Monday, January 03, 2011 8:18 AM
To: Rider, Gina

Re: REQUISITION RETURNED FOR REQUISITION#: 492213
Cart Name: 2011-01-02 gina shopper 01
Prepared for: Gina Shopper
Prepared by: gina requestor
Returned by: gina approver

Dear Gina Shopper,

The requisition listed above which was submitted on your behalf has been returned to gina requestor by an approver. Please contact them for additional details about this requisition.

Your requisition has been returned. Requisition#: 492213

support@scquest.com [support@scquest.com]
Sent: Monday, January 03, 2011 8:18 AM
To: Rider, Gina

Re: REQUISITION RETURNED FOR REQUISITION#: 492213
Cart Name: 2011-01-02 gina shopper 01
Prepared for: Gina Shopper
Prepared by: gina requestor
Returned by: gina approver

Dear gina requestor,

This requisition has been returned. To modify the requisition go to the "Draft Carts", page using the URL below.

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 > under My Drafts Assigned To Others. Either may access the requisition and make the appropriate changes; this effort should be coordinated between the Shopper and Requester.

If The Requester Makes the Changes to the Returned Requisition:
1. Click the Shop Menu icon > My Carts and Orders > View Draft Shopping Carts > My Returned Requisitions section.
2. Click on the Shopping Cart Name to open it.
3. Click Edit Requisition, make the necessary revisions, and click the Submit Requisition button.

If The Shopper Makes the Changes to the Returned Requisition:
1. Click on Carts > Shop Menu icon > My Carts and Orders > View Draft Shopping Carts > My Drafts Assigned To Others section.
2. Click the Unassign button. The Shopping Cart Summary screen is displayed.
3. You may shop to add additional items to the shopping cart or you may edit the cart by clicking the Edit Requisition button. Make the necessary revisions, and reassign the requisition. For information on Editing the Requisition see the Carts & Assign document.
4. Click the Assign Cart button. Verify the Assignee is correct, or select a different Assignee. Enter an optional Note for the Assignee and click the Assign button.
The *Requisition Information Status* window displays. The requisition number stays the same.

You and the *Requester* will both receive an email message indicating the requisition has been submitted once the *Requester* reviews and processes the requisition.
Once the requisition has been submitted the Approver will be able to view the resubmitted requisition in the shared approval folder. The Resubmitted Requisition icon will also display.

XXXIII. If The Requester Returns A Cart To You

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

The Requester may only return the shopping cart back to the original Shopper; the Requester cannot select an alternate user. Upon returning the shopping cart, the Requester must enter a reason as to why the cart is being returned. This will be recorded in the cart History. The Shopper will also receive this information via email.

The Shopper also receives an email indicating the cart was returned.
A record of the returned cart is displayed in the History of the requisition.

If you are the Shopper, to access the returned shopping cart, click the Shop Menu icon > My Carts and Orders > View Draft Shopping Carts > under My Drafts. The Shopping Cart Name displays with the Returned Cart symbol 🛒 next to it.

1. Click on the Shopping Cart Name to open the shopping cart.

2. Click the Edit Requisition button and make the corrections requested by the Requester.

3. Review all other information on the requisition. Verify/correct the Shipping Address, Cost Center, Natural Account Code. Also, be sure to review Comments and Attachments.

4. Click the Assign Cart button.

XXXIV. A Rejected Requisition (The Entire Requisition Or Certain Line Items)

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

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

**The Approver Rejected The Entire Requisition**

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

---

**All Line Items have been Rejected for Requisition#: 604315**

support@sciquest.com

*Extra line breaks in this message were removed.*

Sent: Wed 7/20/2011 10:19 AM  
To: Rider, Gna

Re: LINE ITEM(S) REJECTED FOR REQUISITION#: 604315 Cart Name: 2011-07-14 ginasnopper 02 Prepared for: Gina Shopper Prepared by: gina requestor Rejected by: Jewell Approver

Dear Gina requestor,

All line items in the requisition listed above have been rejected. You can review the details of this requisition online by using "My Requisitions", or by selecting the URL below.


---

**All Line Items have been Rejected for Requisition#: 604315**

support@sciquest.com

*Extra line breaks in this message were removed.*

Sent: Wed 7/20/2011 10:19 AM  
To: Rider, Gna

Re: LINE ITEM(S) REJECTED FOR REQUISITION#: 604315 Cart Name: 2011-07-14 ginasnopper 02 Prepared for: Gina Shopper Prepared by: gina requestor Rejected by: Jewell Approver

Dear Gina Shopper,

All line items in the requisition listed above have been rejected. You can review the details of this requisition online by using "My Requisitions", or by selecting the URL below.

To access the requisition for additional information regarding the Rejection:

1. 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.

2. Click on the Requisition Number to open it.

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

4. There are four actions the Shopper/Requester/Approver may perform on a withdrawn requisition:
   a. Add Comments And Attachments
   b. View Document Comments
   c. Copy To New Cart
   d. Add Notes To History
The Approver Rejected One Or More Line Items
Following review, an Approver may decide to Reject one or more line items on the requisition. If this happens, the Shopper and the Requester will both receive an email indicating one or more line items on the requisition have been rejected.

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

Shopper, Requester, and Approver
Shopping & Cart v 13.3
Questions? Call 597-6446 or email financecustomercare@ohio.edu
A Shopper has two ways to access the requisition.

1. Click the Orders & Documents Menu icon > hover over Document Search > Search Documents > My Requisitions. Then click the Requisition Number to open it.

2. 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.
   a. Click on the magnifying glass
   b. You may use the default document type All, then press the Tab key, enter the Requisition Number that you would like to search for, and click the magnifying glass at the end of that field, or press the Enter key on the keyboard.
3. View the requisition Summary.

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

   ![Image of requisition summary with approved and rejected items]

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

   ![Image of rejected line item]

   The requisition has completed this approval step and will move on to any additional workflow requirements. You may also view the Workflow Approval Process or the History for additional information.
XXXV. The Approver Placed The Requisition On Hold

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

1. To access the requisition for additional information regarding the Hold; you may use the Quick Search feature at the top, right-hand side of the screen.
   a. Click on the magnifying glass.
   b. You may use the default document type All, then press the Tab key, enter the Requisition Number that you would like to search for, and click the magnifying glass at the end of that field, or push the Enter key on the keyboard.
   c. Click on the Requisition Number to open it.

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

![History Tab Example](image)

XXXVI. 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**.

![Draft Carts Example](image)

To access your *Draft Carts* (shopping carts that have not yet been assigned to a **Requester**), 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 open your draft shopping cart,

1. Click the **Shopping Cart Name**.
2. If you want to make edits, click the **Edit Requisition** button, otherwise click **Assign Cart** button to continue processing the order.
To Access Your Draft Carts That Have Been Assigned

To access your Draft Carts that have been assigned to a requester,

1. Click the Shop Menu icon
2. Hover over My Carts and Orders > View Draft Shopping Carts > My Drafts Assigned To Others.

**Note:** To make changes to your cart, do one of the following:
You may Unassign the cart only until the Requester has submitted the cart to the Approver or you may ask the Requester to return the cart to you.

3. Click the Unassign button,
4. Click the Edit Requisition button
5. Make revisions to your shopping cart
6. To reassign the cart, click the Assign Cart button
7. Click the Assign button.
8. Once the Requester has clicked the Return Cart button, you will find it in the Shop Menu icon > My Carts and Orders > View Draft Shopping Carts > under My Drafts.

XXXVII. How Do I Find My Shopping Cart Once It Becomes 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*, enter the *Requisition Number* and click *Go*. Click on the Requisition Number to open and view it.

![Requisition Search](image)

3. Use the *Quick Search* feature at the top, right-hand side of the screen.
   a. Click on the magnifying glass.
   b. You may use the default document type *All*, then press the *Tab* key, enter the *Requisition Number* that you want, and click the magnifying glass at the end of that field, or push the Enter key on the keyboard.
   c. Click on the *Requisition Number* to open and view it.

![Quick Search](image)

4. Click the *History* tab. All *Comments* and *History* will display.

![History Tab](image)

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.
XXXVIII. Modify the Shopping Cart

1. 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).
2. Click the Shop Menu icon > hover over My Carts and Orders > View Draft Shopping Carts > My Drafts Assigned To Others.
3. Click the Unassign button for the appropriate requisition.
4. Make any necessary changes by editing the Cart Summary Page or clicking the Edit Requisition button and editing the cart.
5. Click the Assign Cart button.
6. Verify the Assignee is correct, or select a different Assignee.
7. Enter an optional Note to the Assignee and click the Assign button.

XXXIX. Quick Search

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

1. Use the Quick Search feature at the top, right-hand side of the screen.
2. Click on the Magnifying Glass (top right). The Quick Search window is displayed.
   a. You may use the default document type All, or click the down-arrow and select the desired Document Type.
   b. Press the Tab key, enter the specific Document Number that you want to search for.
   c. Click the magnifying glass at the end of that field, or press the Enter key on the keyboard. Your search result will be displayed.
XL. **Invoice Approvals**

As a *Shopper* you may be required to approve an invoice on a services purchase order before the invoice can be paid. Purchase orders derived from Direct Payment forms are excluded from this process. There will be two instances when the system will automatically require the shopper to approve an invoice before the payment will be processed.

**Approve An Invoice For A Service Purchase Order**

Procure to Pay will require the shopper to approve an invoice for a service purchase order greater than $500.00 and less than $10,000. The purchase order will require invoice approval if the invoice uses natural account numbers: 179000, 184000, 186000, 189000, 611100, 612100, 797000, 797100, 920000, 930000, 971000, and 971100.

**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.

**For both processes, follow the invoice approval steps below:**

You will be notified that you have an invoice to approve. There are several processes to locate the invoice (Steps# 1-#4).

1. You will receive an email informing you that an invoice approval is required.
   a. Click on the link in the email. It will direct you to the invoice approval screen in BobcatBUY.
   b. Log into BobcatBUY using your Ohio ID and password.
   c. Click the *My Invoice Approvals* link.
   d. Click the *Voucher Number*. Go to step #5.

2. Click the *Action Items* link located next to your name in the top right of your browser window.
   a. Click the *Invoices To Approve* link. The list of Invoices are displayed.
      b. Click on the *Voucher* number to display your invoice. Proceed to step #5.
3. Perform a quick search.
   a. Click on the magnifying glass. The Quick Search window is displayed.
   b. Click the down-arrow and select the **Invoice Number** link.
   c. Press the **Tab** key, enter the **specific Invoice/Voucher Number**.
   d. Click the magnifying glass at the end of that field, or push the Enter key on the keyboard. Your Invoice Voucher is displayed. Proceed to step #5.

4. Click **Orders & Documents Menu** icon > hover over **Approvals** > **My Approvals**. The list of Invoices are displayed. Click on the **Voucher** number to display your invoice. Proceed to step #5.

5. The Invoice Voucher is displayed. Verify if you received the services/products and if the dollar amount is correct. If the invoice is not an electronic invoice, there will be an attached invoice for you to review. There will be a (#) listed on the Attachments tab. Another way to verify electronic vs. manual, is to look in the General section, in the Invoice Source field. If **Manual** is displayed, there is an attached invoice to view and approve. If **Electronic** is displayed then you will view the details on the Summary tab displayed.
6. You may **Add A Comment** and email the comment before approving the invoice.

   a. If there is a number (#) displayed in the **Comments** tab, click the **Comments** tab to review the existing comments.

![Comments tab](image)

   b. To Add a comment click on the **Comments tab>Add Comment** button.

![Add Comment](image)

   c. You may email the comment to the shopper, the requester, the Accounts Payable staff, or any other BobcatBUY user.

   d. Click in the checkbox to the left of the name of the person you want to email.

   e. Click the add **email recipient link** to add another BobcatBUY user as an email recipient.

   f. Enter the comment in the blank box.

   g. To **Attach** a file, click on the **Browse** button, navigate to your file, and double-click the file you want to attach. You may want to **Attach** a file explaining your decision to approve, reject, or forward the invoice.

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

   i. Click the **Add Comment** button. **WARNING:** When you add a comment, it cannot be removed.

![Add Comment](image)
j. All Comments may be reviewed.

7. To add a Note to History,
   a. Click in the Available Actions drop-down list. Scroll down and click on the Add Notes To History option. Click the Go button.
   b. Enter the note, then click the Attach button.

8. If there is a number in the Attachments tab,
   a. Click on the Attachments tab to review the attached document. The attachment is most likely a copy of the scanned invoice. This invoice would be identified as a Manual Invoice Status. An Electronic Invoice Status would not have an attached invoice. The invoice information was electronically sent by the Supplier and is located within the Buyer Invoice tab> Summary tab.
   b. Click on the attachment file to open the invoice.
c. Click the **Open** button. Review the details of the invoice to make an informed decision as to whether or not the detailed services/products were rendered and if the dollar amount of the invoice is accurate.

d. Click the “X” in the upper, right-hand corner of the invoice to close the invoice.

9. You are ready to process (approve) the invoice.
   a. Click in the *Available Actions* drop-down list, choose **Approve/Complete Step**.
   b. Click **Go**.

10. After you click **Go**, the invoice remains displayed. To process the next invoice, if applicable, you must either click on the **Return to Approvals** link, or click on the right arrow displayed next to the number of results (i.e. 1 of 37 results).

After the invoice has been approved, you will receive an email indicating the workflow has been completed.

```
Workflow Routing Completed for Invoice#: B0000462
support@sciquest.com
Sent: Wed 12/18/2013 1:57 PM
To: Gina Shopper,

Re: Workflow Routing Completed For Invoice#: B0000462

Dear Gina Shopper,

The Invoice listed above has completed workflow routing. You can update and track the status of Invoice online by using “My Invoices,” or by selecting the URL below.

https://userertest.sciquest.com/apps/Router/BuyerInvoiceSummary?
BuyerInvoiceId=01246&AuthToken=022070&tмест=1291393848491
```
XLI. Reject An Invoice

As a Shopper you may need to Reject an invoice (excluding purchase orders derived from Direct Payment forms), so the invoice will not be paid.

NOTE: If you reject an invoice for payment, you must contact the supplier in order to request a new invoice with the corrected invoice details/total. Usually the shopper/department knows what terms were agreed upon and delivered, and can inform the supplier regarding the invoice details that require revisions.

1. Click the Action Items link located next to your name in the top right of your browser window. Click the Invoices To Approve link. The list of Invoices are displayed. Click on the Voucher Number. Your Invoice Voucher is displayed.

2. Click in the Available Actions drop-down list, select Reject/Cancel, and click Go.

3. Enter an optional Reject Reason in the textbox and click the Reject/Cancel button. At this time, the invoice will not be marked as OK to Pay and will be marked as rejected/canceled.
4. After you click Reject/Cancel, the invoice remains displayed.

5. Click on the invoice to open and then click on the Approvals tab to view the workflow. The Canceled (Rejected) step will be displayed within the Services Approval Folder, along with the name of the BobcatBUY user that processed the rejection.

Select whether you would like the workflow steps to display vertically or horizontally. The default is horizontal. Setting the orientation to vertical is remembered with a browser cookie, so it will be set for a browser on PC or device until cookies are reset. The horizontal view will display the steps from left to right. The vertical view will display the steps from top to bottom.

6. You will receive an email indicating the Rejection was processed.

```
To: Rider, Ohio

Re: LINE ITEM[S] REJECTED FOR INVOICE#: B0000292

Dear Trainer1 Shopper1,

All line items in the Invoice listed above have been rejected. You can review the details of this invoice on line by using “Document Search,” or by selecting the URL below.


****

If you have any questions with regard to this invoice, please contact the approver who rejected the invoice or your SelectSite Support Team.

Support Team Contact Information:
+1 (740) 597-8445
procurement@ohio.edu

Thank you,
Ohio University

7. To process the next invoice, if applicable, you must either click on the Return to Approvals link, or click on the right arrow displayed next to the number of results (i.e. 1 of 37 results).```
XLII. Forward An Invoice

You may be the BobcatBUY user who created the purchase request on behalf of someone else. If you did not work with the supplier you may not be able to verify the details of the invoice (hours worked in a given time period, travel expenses, quantity of items, etc.). If another BobcatBUY user is better suited to verify the invoice details, Forward the invoice to the appropriate person for approval.

NOTE: You must forward the Invoice to an authorized BobcatBUY user.

1. Click the Action Items link located next to your name in the top right of your browser window. Click the Invoices To Approve link. The list of Invoices are displayed. Click on the Voucher number. Your Invoice Voucher is displayed.

2. Click in the Available Actions drop-down list, select Forward, and click Go.

3. A User Search window opens. To locate the appropriate person, search by Last Name, First Name, User Name, Email, or Department. Enter the appropriate search criteria and click the Search button.

4. Next to the desired name, click the Select link.
5. Enter a **Note** to the user who will approve the invoice, and click the **Forward** button.

![Add Note](image)

6. After you click **Forward**, the invoice remains displayed.

7. Click on the invoice to open and then click on the **Approvals** tab to view the workflow. The name of the BobcatBUY user now assigned to the Invoice Approval will be displayed within the **Services Approval Folder**. The step is labeled Active which means it is still waiting for the required approval by the named user.

Select whether you would like the workflow steps to display vertically or horizontally. The default is horizontal. Setting the orientation to vertical is remembered with a browser cookie, so it will be set for a browser on PC or device until cookies are reset. The horizontal view will display the steps from left to right. The vertical view will display the steps from top to bottom.
8. The recipient of the Forwarded Invoice will receive an email indicating their pending Invoice Approval.

---

Re: YOUR APPROVAL IS PENDING FOR INVOICE#: B0000289

Folder: Regina Rider,

The Invoice listed above has been submitted for your approval and is located in the folder listed. The Invoice can be accessed for review in "My Invoice Approvals" or by selecting the URL below.

POR: 1268722
Supplier Name: VWR International


****

If you have any questions with regard to reviewing/approving this invoice, please contact your SelectSite Support Team.

---

9. To process the next invoice, if applicable, you must either click on the Return to Approvals link, or click on the right arrow displayed next to the number of results (i.e. 1 of 37 results).
XLIII. View All Invoices That You Processed

You may view the invoices you have processed. There are several ways to locate the invoices.

1. Click Accounts Payable Menu icon > AP Dashboard.

2. Click on the Invoice Approval Outbox link.

3. Another method to locate your processed invoices is to click Orders & Documents Menu icon > hover over Approvals > My Recent Approvals. The list of Invoices are displayed. Click on the Voucher Number. Proceed to step #4.

4. A list of your processed invoices is displayed. You may hover over the icons displayed to the left of the Voucher Number and a pop-up message will identify the workflow status of the Invoice: Pending, Completed, Rejected, or Partially Rejected.
5. You may sort the invoices by clicking on the drop-down arrow in the Sort By: field. Scroll down and click on the appropriate sort function.

6. To refine the results, use the Filtered By section on the left side of the page. You may select a specific Date Range, then sort by My Action, Workflow Step, Department, Workflow Status, Invoiced By, Invoice Owner, Invoice Source, Invoice Type, Matching Status, Payment Status, and Supplier.
7. Click on the Voucher Number of the desired invoice.
8. Click the History tab from this document to view the entire process.
9. Click the Approvals tab to view the workflow. Select whether you would like the workflow steps to display vertically or horizontally. The default is horizontal. Setting the orientation to vertical is remembered with a browser cookie, so it will be set for a browser on PC or device until cookies are reset. The horizontal view will display the steps from left to right. The vertical view will display the steps from top to bottom.
XLIV. Invoice Payment Status And Other Payment Information

1. Open the invoice to verify it has been approved. Click Accounts Payable Menu icon > AP Dashboard.

2. Click in the Search field. Enter the Invoice number. Click Go.

3. The Invoice Number and associated documents are listed. Click the invoice’s Document Number to open it.

4. You may find out immediately if the Invoice is Paid by clicking the Buyer Invoice tab > click the Summary tab > under the General Section. If the Invoice is not paid you can check the Due Date.
   a. Pay Status: The status will display In Process if the invoice is awaiting approval, Scheduled for Payment per Terms if the invoice is due to be paid, or Paid if the invoice has been paid.
   b. Supplier Invoice No.: The Invoice Number on the original invoice sent by the Supplier.
   c. Invoice Date: The date on the original invoice sent by the supplier.
   d. Due Date: The date the check will be either printed or electronically sent. This reflects the Invoice Date plus (+) the Terms (usually Net 30).
   e. Terms: The terms under which the invoice will be paid. Almost all invoices are paid Net 30. This means that the check will be printed 30 days after the Invoice Date.
   f. Match Status: Displays the match status of an invoice/credit memo on the header level of the invoice. It indicates if the invoice line has been matched to its associated purchase order and /or receipt lines. Match status options:
i. **Matched**: The system or user has completed the match process and the invoice is valid within defined tolerances.

ii. **Unmatched**: The Matching has not been performed or the invoice has is not valid within the defined tolerances.

g. **Invoice Source**: Defines how the invoice/credit memo was created.
   i. **Manual** defines that the Invoice was manually entered by an OU Accounts Payable staff member, then attached a scanned copy of the Supplier Invoice (See the Attachments tab).
   
   ii. **Electronic** defines that the Invoice was created via an import process from the Supplier. There will be no attached invoice in this case.

5. If the Invoice has been paid, click the **Buyer Invoice** tab>**Payment Information** tab. View the **Payment Method**, **Check No.**, and **Check Date**.

---

**Shopper, Requester, and Approver**

Shopping & Cart v 13.3

Questions? Call 597-6446 or email financecustomercare@ohio.edu
6. If the Pay Status is *In Process*, then you may want to check the current *Approval* folder in which the Invoice is located. Click the *Approvals* tab. View the *Invoice Approval* folder. Identify the name of the approver currently assigned to process the Invoice approval. Click the *View Approvers* link to view the approver’s email address and phone number if you need to contact that person.

7. Click *History* tab to view the complete History of the Invoice. You may view the check date, check number, and pay status from the History screen as well.
XLV. Access the Invoice From the Purchase Order

1. Enter the Purchase Order Number in the Quick Search field (refer to Quick Search instructions in the Table of Contents).

2. Click on the Invoices tab.

3. The Purchase Order number and Supplier name are listed above the tabs. The Invoice Summary section will display the Voucher number/s associated with that Purchase Order, Supplier Invoice Number, Invoice Date, Due Date, Invoice Type, Payment Status, Invoice Total, and Invoiced By. The Invoice Line Details section displays each Line Item No., Product name, Catalog No., Unit Price, Qty/UOM Ordered, Extended Price, Invoice Qty/Cost, and Status of the Invoice.

4. You may Add Comment, Add Notes to History, and/or Print Fax Version from the Available Actions field (refer to Table of Contents for instructions on Add Comments, and Add Note To History).

5. Click on the Voucher Number to view the invoice details.
XLVI. If I Receive The Invoice, How Do I Send It To Procure To Pay?

If you receive an invoice that should have been sent directly to the Procure to Pay office, do one of the following:

1. Email the invoice (as long as there are no social security numbers visible on the invoice) to accounts.payable@ohio.edu

2. Fax the invoice to the Finance Customer Care at Fax: 740-593-9890.

3. Campus mail the invoice to the Finance Customer Care, WUSOC (formerly HDL Center), Room 204.

**WARNING:** Do not attach an invoice to a purchase order; *Procure To Pay* will not receive it.
### XLVII. Units Of Measure

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