






Revised 11/18/13

 <b>Homepage</b>	Clicking on the <b>Homepage</b> icon will return the user to the site page that is configured as the homepage.
 <b>Shop Menu</b>	The <b>Shop</b> menu contains the menu options related to shopping tasks including product quick search, access to the shopping page, forms and favorites and access to carts and orders.
 <b>Orders &amp; Documents Menu</b>	Menu items related to Document Search and Approvals are located in the <b>Orders &amp; Documents</b> menu.
 <b>Catalogs and Contracts Menu</b>	Tasks related to the setup and management of hosted catalog content, contracts and consortiums are located in the <b>Catalogs and Contracts</b> menu. Organizations who manage their own hosted catalog (i.e. stockroom) and/or use Org Catalog or Item Master can also access those features from this menu.
 <b>Accounts Payable Menu</b>	The <b>Accounts Payable</b> menu contains all tasks related to AP Director and Settlement Manager, including invoice management and AP administration.

## BobcatBUY Roles Defined...

### Shopper

All roles in BobcatBUY may shop. A *Shopper* creates the shopping cart and

1. If the person is a *Shopper only*, she will assign the cart to her *Requester*.
2. If she is shopping as a *Requester*, she will submit the requisition. Only requisitions  $\geq$  \$1,500 will go to the *Approver*.
3. If she is shopping as an *Approver 1*, she will submit the requisition. Only requisitions  $\geq$  \$5,000 will go to the *Approver 2*. Other staff may be designated as *Approver 2*, but this role is commonly assigned to the *Budget Unit Manager*.

### Requester

As a *Requester*, you must review all purchase requests from those in your approval chain up to \$1,499.99. Once you *Submit* the requisition, it will move into the workflow; it will not route to an *Approver*. If the *Shopper* did not edit the requisition, you may add/update information such as *Ship To* address, *Cost Center* (account number), split items between *Cost Centers*, and add *Internal/External Notes* and *Attachments*. When a *Shopper* assigns a *cart* to you, an email is automatically sent to notify you of the pending requisition. As a *Requester*, you may approve purchase requests from *Shoppers* up to \$1,499.99 and self-approve your own purchases up to \$1,499.99.

### Approver 1

As an *Approver 1*, you must review purchase requests from those in your approval chain between \$1,500 and \$9,999.99. You may receive carts assigned directly to you.

In addition, 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 be routed to you.

When a *Shopper* assigns a purchase request, 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 purchase 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  $\geq$  \$10,000.

### Methods For Shopping In BobcatBUY

BobcatBUY offers three methods for locating and purchasing products: Hosted Catalog, Punch-Out Catalog, and Non-Catalog Item.

A **Hosted Catalog** is an online version of the supplier's items included in OHIO's contract. Hosted catalogs contain items description, part numbers, pricing, and images (if provided by the supplier). The shopping experience 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 performing a hosted catalog search, results may include items from multiple suppliers. Item comparisons may be performed side-by-side between suppliers. **Results may also contain products from Level II Punch-Out Suppliers. For these products, you will see an Order From Supplier link.**

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

A **Punch-Out Catalog** is an integrated external link to the supplier's website created specifically for OHIO. **WARNING: Your internet browser must be set to allow pop-ups.** The items reflect OHIO's discounted prices; however, the items and prices may change more frequently than a hosted catalog. A *Punch-Out Catalog's* search feature is supplier specific; if you are familiar with the supplier's public website, its punch-out website will be similar. You cannot compare prices between punch-out suppliers and hosted catalogs. 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 per week: Monday, Wednesday, and Thursday.

A **Non-Catalog Item** form should be entered if the *Supplier* is a Non-Catalog supplier. You may also complete the Non-Catalog Item form if you cannot find the item in a hosted or punch-out catalog or if the item is very new to the market and has not been added to the catalog yet. You may also use a *Non-Catalog Item* form to request one-time services that will not be entered on a *Blanket Order Form* or *Service Agreement Purchase Order*. If a *Non-Catalog Item* includes *Shipping/Handling*, you may add it separately to the same cart using this form. **WARNING:** The supplier must be an existing supplier in BobcatBUY. You must attach a *Quote* to a *Non-Catalog Item* form.

All Non-catalog Item orders route to *Procure To Pay* in the approval workflow. If your item is needed in a timely manner, set the *Priority* as **Urgent** when you edit your shopping cart. After your Requester and/or Approver submits the cart, a *Procure To Pay Buyer* will review it.

**NOTE:** The *Shopper* must notify the supplier to request an invoice if a deposit or prepayment is required (hotel or conference reservation). Attach the invoice (for the required deposit) to the purchase requisition.

## Browse Suppliers

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

1. To determine if a particular *supplier* is in BobcatBUY, click the **Homepage** icon.
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. In the *Supplier* field, enter the *name* of the supplier and click **Search**. You may enter any part of the supplier's name. You may also enter the first letter of a supplier's name. Example: If you enter "B" in the *Supplier* field, all of the suppliers that begin with the letter "B" will display.
5. You may also search by *Supplier Type* (Hosted Catalog, Punch-out, or Non-Catalog).
6. In the *Supplier* field, enter the first letter of a supplier's name.
7. In the *Supplier Type* field, click the down-arrow and select **All, Hosted Catalog Suppliers, Punch-Out Suppliers, or Non-Catalog Suppliers** and click **Search**.
8. After verifying that your supplier is in BobcatBUY, you may begin shopping.

## Supplier Management

The Supplier Management tab is available as an additional resource to view supplier profiles and to determine if a particular supplier is in BobcatBUY. The search results now display the legal company name including the DBA.

### Simple Search:

1. Click the **Supplier Management** icon.
2. Click the **Search For A Supplier** link.

3. In the *Search* field, enter the **Name** of the supplier and click the **Go** button.
4. To view the supplier profile, click the **Manage** button, scroll down and click the **View Supplier Profile** link, or click the **Name** of the supplier.
5. To view specific details, click the desired tab.

### Advanced Search:

1. Click the **Supplier Management** icon.
2. Click the **Search For A Supplier** link.
3. Click the **Advanced Search** link.
4. In the *Supplier* field, enter the **Name** of the supplier and click the **Search** button.
5. Click the appropriate **Supplier Type** (All, Hosted Catalog Suppliers, Punch-Out Suppliers, or Non-Catalog Suppliers) and click the **Search** button.
6. You may also search by **Class** (Science Catalog Supplier), **Status** (All, Active, or Inactive), or **Diversity Classifications** of the supplier.

### Quick Search

Any OHIO BobcatBUY user may access any requisition in the system. If you know the requisition number, you may use the *Quick Search* feature (top right).

1. To perform a *Quick Search*, click the **Magnifying Glass** icon (top right).
2. In the *Quick Search* fields, click to select the *type* of document you want to search for and enter the **Number** and press **Enter**.

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

### Product Search

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. You may refine your search by using the *Filter Results* section on the left side of the page. You may *Filter Results* **By Supplier, By Category, By Packaging UOM, By Result Type, or By Manufacturer Name**.
4. To return to your original search results, click the **Show All** link under the same category that you filtered by.
5. To *Sort* your search results in a particular order, in the *Sort By* field, click the down-arrow and select **Price: Low to High** or **Price: High to Low**. This feature will only work if your displayed results are 200 or fewer.

### Add To Cart

Locate the desired product in the *search results*.

1. When the desired product is located, you may add it to your *shopping cart*.
2. The *default Quantity* is one (1). Modify this number, if necessary.
3. Click the **Add To Cart** button.

## Where Is My Shopping Cart?

1. Click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**.
2. To open a specific shopping cart, click the appropriate **Shopping Cart Name**.
3. To access your *active shopping cart*, click the *shopping cart Quick Link* (top right). Click the **View My Cart** button.

## 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 the *shopping cart Quick Link* (top right) and click the **View My Cart** button.
2. Click the **Prevailing Wage** checkbox and click **Save**.

## Product Comparison


1. While shopping, to compare product pricing and attributes, from the *search results*, click **Compare** next to several of the items that you want to compare. A green check mark will appear next to the items that you selected.
2. Above the *search results*, click the **Compare Selected: #** button.
3. Compare the products side-by-side. If you decide to purchase an item, the *default Quantity (Qty)* to be ordered is one (1). Modify this number, if necessary.
4. To add an item to your *shopping cart*, click the **Add To Cart** button.
5. To continue shopping, click << **Back To Search Results**.

## Punch-Out Supplier

**WARNING:** Your internet browser must be set to allow pop-ups.

**NOTE:** The interface and functionality of a punch-out website varies among suppliers.

1. Some punch-out suppliers are included in the *Preferred Suppliers* section. Click the **Homepage** icon.
2. Click the **Suppliers** link (under the *hosted catalog* search field).
3. Click the *plus sign* next to **Click To Expand Search For Supplier Filter**.
4. In the *Supplier Type* filed, click the down arrow, choose **Punch-out Suppliers** and click the **Search** button.
5. To access the punch-out supplier, click the **Punch-out Supplier** icon for the desired supplier.
6. Follow the supplier's instructions to search for/add items to your *shopping cart*.
7. The products that you purchase through the supplier's *punch-out catalog* will be transferred to your BobcatBUY *shopping cart*. Click the **Transfer Shopping Cart** button.


The punch-out catalog icon  will display in your *active shopping cart*.

**NOTE:** To modify a *Punch-Out Catalog* item, in your BobcatBUY *shopping cart*, click **MODIFY ITEMS**. Make your changes in the *Punch-Out* website, follow the supplier's steps to *Update* the cart, and return to BobcatBUY.

## Non-Catalog Item

**WARNING:** You must attach a *Quote* to a *Non-Catalog Item* form. For a non-catalog item, it is assumed that you have either talked to the manufacturer/supplier or you visited the supplier's 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 to complete a *Non-Catalog Item* form in a NEW shopping cart.

A *Non-Catalog Item* form must be completed if the supplier is a *Non-Catalog Supplier*. You may also use the *Non-Catalog Item* form, if you cannot find the item in a hosted or punch-out catalog or if an item is very new to the market and has not been added to the catalog yet. Prior to completing the *Non-Catalog Item* form, you must contact the manufacturer or supplier and obtain basic product information for the item. The supplier must be an existing supplier within BobcatBUY.

1. Click the **Homepage** icon.
2. Click the **Non-Catalog Item** link (under the *hosted catalog* search field).
3. Enter the *Supplier* or click the **Supplier Search** link and click the **Search** button.
4. The preferred *Fulfillment Center Address* will *default*, but it can be changed by clicking the **Select Different Fulfillment Center** link.
5. Under *Suppliers Found*, click the **Select** link next to the appropriate *Supplier Name/Address*.
  - If the appropriate **Fulfillment Center** is not available in BobcatBUY, you must initiate the supplier's completion of a new **OHIO Substitute W-9** (formerly the *Payment Compliance Form*).
6. Fill in all of the required fields for **Product Description, Catalog No., Quantity, Price Estimate, and Unit of Measure (UOM)**. **NOTE:** If you do not know the *price*, a Commodity Manager will solicit a quote for the item/s.
7. Next to the *Commodity Code* field, click the **Magnifying Glass**  button and click the **Search** button.
8. Click the **Select** button for the appropriate *Commodity Code*.

**NOTE:** When entering a non-catalog item, you must choose the appropriate *Classification*. This is the only way that Ad Hoc Approvals for non-catalog items will be processed into their respective approval folders for tracking/reporting purposes.

9. If the item has a specific *Classification*, click the appropriate checkbox: **Controlled Substance, Recycled, Hazardous Material, Radioactive, Rad Minor, Select Agent, Toxin, Energy Star, or Green**.
10. Click the **Save And Close** button or click **Save And Add Another** to add another non-catalog item.

**NOTE:** It is mandatory to add a *Commodity Code* for a non-catalog item. This is a required field.

11. If you did not complete one of the required fields, an error message will display. Enter the required information and click **Save and Close**. The system will automatically add the non-catalog item to your *active shopping cart* (top right corner).

## Internal Notes And Attachments (Attach OHIO Substitute W-9, Quotes, etc.)

A *Note* may be entered in the *Header* section of the requisition or in the *Line Item Detail* section for a specific line item. **NOTE:** All invoices should be scanned and emailed to [accounts.payable@ohio.edu](mailto: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. Enter notes or attachments that **will be visible internally** (OHIO staff). You may attach a quote here.
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. The Attachments window opens, “**Select files...**” button to navigate to the location where your file is saved. Choose the “File to Attach,” Click “**Select Files...**” to add another file (Repeat for each additional file). Click “Save” when all files have been added.
4. To move an Internal Attachment to an External Attachment, Click the drop down menu next to “**remove**” for the attachment to move, Select “**Move to External Attachments.**”
5. To add a **URL/Link**, click the **Add Attachment** link. Under the *Attachment Type* list, select **URL/Link**. Enter a **File/URL Name** and the **Link/URL**. Click **Save**.
6. To remove an *Attachment*, click the **Remove** link next to the *Attachment/URL* that you would like to remove and click **Remove**.

## 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. Click the **Homepage** icon.
2. Click the **Non-Catalog Item** link (under the *hosted catalog* search field).
3. Enter the same **Supplier** as the *Non-Catalog Item* you are ordering.
4. In the *Product Description* field, enter “**Shipping and Handling.**”
5. In the *Catalog No.* field, enter “**Shipping.**”
6. In the *Quantity* field, enter “**1.**”
7. In the *Price Estimate* field, enter the *Shipping/Handling Quote* or **Estimate**.
8. For *Shipping/Handling*, enter the same **Commodity Code** as the *Non-Catalog Item* you are ordering.
9. 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.

## Add To Favorites

The *Add To Favorites* option is located in several places throughout BobcatBUY. It provides the opportunity to add frequently purchased items to your personal *Favorites* folder.

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, click the **Add Favorite** link (located next to the *Compare* link). A new window opens.
4. Enter an **Item Nickname** for the product (top of the window).
5. To create a *New Top Level Folder*, click the **New** button and select **Top Level Personal Folder**.
6. Enter a **Name** for the folder, add an optional **Description**, and click **Save**.
7. To create a *Subfolder*, click the *Root Folder* that will hold the subfolder, click the **New** button, and select **Subfolder Of Selected Folder**.
8. Enter a **Name** for the subfolder, add an optional **Description**, and click **Save**.
9. Click **Submit**. Click **Close**.
10. To access the *Favorites* folder, click the **Homepage** icon.
11. Click the **Favorites** link (under the *hosted catalog* search field).
12. Click the desired *folder* (on the left) or click the *plus sign* to expand the subfolder/s within the root folder, and click the desired subfolder. All products that have been added to this folder will display.
13. To add a product to your *shopping cart*, update the *Quantity*, and click the **Add To Cart** button.

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

## Create A New Cart

1. Click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**.
2. Click the **Create Cart** button. A new shopping cart summary screen opens.
3. To rename your *shopping cart*, highlight and delete the default *Cart Name* and enter a new **Cart Name**.
4. Enter an optional **Description** for your new *shopping cart*.
5. The cart’s *default Priority* is **Normal**. To change the *Priority*, click the down arrow and select **Urgent**. **NOTE:** The **Urgent Priority** should be used in moderation.
6. Click **Save**.
7. Click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**>located under **My Drafts**.
8. To open a specific shopping cart to begin shopping, click the appropriate **Shopping Cart Name**. Next click on Home icon and start to shop.



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

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

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

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

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

10. If a number (#) is displayed in the *Comments* tab, click the **Comments** tab to review the comments.
  11. If a number (#) is displayed in the *Attachments* tab, click the **Attachments** tab to review the attached document. Click on the *Attachment* to open it.
  12. Click the **History** tab to see if there is a message from Oracle Financial Management System indicating whether or not sufficient funds are available.
- NOTE:** Upon completion of your requisition, all fields in the workflow process will display a green checkmark. The requisition is now ready for submission.
13. Click the **Assign Cart** button.

## Assign A Cart

When you are finished shopping/editing your requisition, you must *Assign* your cart to a *Requester* for review. If approved, the requisition will turn into a *Purchase Order* and will be sent to the *supplier*.

### To Edit The Requisition:

1. In the *active shopping cart*, click the **Edit Requisition** button and review all of the information on the requisition. (See **Edit Requisition** above for instructions.)
2. Verify/correct the *Shipping Address*, *Cost Center* (account number), *Account Splits* (between cost centers), and *Natural Account*, etc.
3. Click the **Assign Cart** button.

### To Assign The Requisition:

1. In the *active shopping cart*, click the **Assign Cart** button.
2. Or click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**.
3. To open a specific shopping cart that you want to *assign* to a *Requester/Approver*, click the appropriate **Shopping Cart Name**.
4. In the *shopping cart*, click the **Assign Cart** button.

There are three ways to select an *Assignee*: choose the default *Assignee* that you setup in your *Profile*, search from the *Profile Values* (if you setup multiple *Assignees* in your *Profile*), or search for an *Assignee* from *All Assignees* listed in *BobcatBUY*.

- a. A default *Assignee* automatically displays from your *Profile*. If this is the correct *Assignee*, enter a **Note** to the *Assignee*. The *note* will be included in an auto-email sent to the assignee as well as the *History* of the document. Click the **Assign** button.
- b. If you setup multiple *Assignees* in your *Profile*, click the **Select From Profile Values** link. Click the down arrow and choose the appropriate *Assignee*. Enter a **Note** to the *Assignee*. Click the **Assign** button.
- c. To select an *Assignee* from your *organization*. Select the **Search For An Assignee** link. Enter the following: **Last Name, First Name, User Name, Email, or Department**. Click the **Search** button. Click the **Select** link next to the appropriate *Assignee*. If you would like to add this person to your *Profile*, click the *Add To Profile* checkbox. Enter a **Note** to the *Assignee* and click the **Assign** button.

**NOTE:** You may **Unassign** the *shopping 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.

### The Assigned Cart Reminder Email Notification

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

## Overview Of Actions For A Withdrawn Requisition

There are three actions the *Shopper* or *Requester* may perform on a withdrawn requisition: *Add A Comment*, *Copy To New Cart*, and *Add Notes To History*.

**NOTE:** Any BobcatBUY user may access any Requisition in BobcatBUY. If you know the requisition number, you may use the *Quick Search* field in the top right.

## A Requester May Withdraw A Requisition Returned By The Approver

If a requisition is returned by the *Approver*, the requisition is returned to the *Requester* and the *Shopper*. Depending on the reason the requisition was returned, one of three things may happen: 1) The *Shopper* may *Unassign* the cart, *Edit* the cart, and *Reassign* the cart; 2) The *Requester* may contact the *Shopper* for additional information, *Edit* the cart, and *Resubmit* the cart; 3) The *Requester* may *Withdraw* the requisition completely.

1. If the *Requester* wants to *Withdraw* the requisition, click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**.
2. Under *My Returned Requisitions* section. Click the **Withdraw** button.
3. To access the withdrawn requisition, click the **Orders & Documents** icon, hover over **Document Search**, and click **Search Documents**.
4. In the *Search* field, select **Requisition** and enter the **Requisition Number** in the search field, and click **Go**.
5. The *Status* displays the *Requisition Withdrawn* symbol. ←
6. Click the **Requisition Number** to open it.

## Add A Comment And Attachment

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

**WARNING:** You must attach a *Quote* to a *Non-Catalog Item* form.

### For Shoppers and Requesters:

1. Open the appropriate *shopping cart*.
2. In the *shopping cart*, click the **Edit Requisition** button.
3. To add a comment, click the **Comments** tab.
4. Click the **Add Comment** button.
5. Enter your *Comment* in the text field.
6. To add an *Attachment*, in the *Attachment Type* drop-down list, select **File**. Enter a **File Name** and click the **Browse** button to navigate to where your file is saved. **Double-click** the file that you would like to *attach*, and click **Add Comment**.

**NOTE:** When comments are included, the *Comments* tab includes a number in parenthesis equivalent to the number of comments that have been added. This is a visual alert to BobcatBUY users. To view a *comment*, click the **Comments** tab.

### For Approvers Only:

1. Open the requisition. In the *Available Actions* drop-down list, select **Add Comment** and click **Go**.

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

## View Document Comments

When you open a requisition, purchase order, invoice, or receipt, *Comments* may be viewed via the *Comments* tab. To view the trail of comments, review the *Comments* as well as the *History* for the current document that is open OR for all associated document types (requisition, purchase order, invoice, and receipt).

1. To view *Comments*, click the **Comments** tab. By default only the comments for the current document are displayed.
2. You may use the *Filter* to view associated documents. Click the **Show Comments For** down arrow and select the appropriate document or choose **All** to display *Comments* for all of the associated documents.

## Copy To New Cart

You may want to *Copy* an existing *shopping cart* to a *NEW shopping cart*, even if the requisition has already been turned into a purchase order. This may be an order that you want to repeat.

**WARNING:** *Comments* will not be copied to the *new cart*. Additionally, *Punch-Out Catalog suppliers* do not support this feature. If the items that you want to copy are from a *Punch-Out Catalog*, open a *NEW cart* and create a *NEW purchase request*.

1. Open the requisition. In the *Available Actions* drop-down list, select **Copy To New Cart**, and click **Go**. A *NEW shopping cart* summary will open containing the identical items.
2. To rename your *shopping cart*, highlight and delete the *default Cart Name* and enter a new **Cart Name**.
3. Enter an optional **Description** for your new *shopping cart* and click **Save**.
4. Click **Edit Requisition**, make the necessary revisions, and click the **Assign Cart** button. If you are a *Requester*, click the **Submit Requisition** button.
5. Verify the *Assignee* is correct, or select a different *Assignee*.
6. Enter an optional **Note** to the *Assignee* and click the **Assign** button.

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

### Add Notes To History

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

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

### View The History (Withdrawals, Comments, And Notes)

You may view the *History* (Comment, Note, and reason for a Withdrawal).

1. Open the requisition by using the *Quick Search* feature (top right).
  2. When the requisition opens, click the **History** tab.
- You will be able to view the entire *History* for this requisition. The *History* tracks the *Date/Time* of each change, the *Action*, *Comment*, *Note*, and reason entered for a *Withdrawal*.
3. You may use the *Filter* to view any associated documents. Click the **+Click To Filter History** button. In the *Filters* window, you may use one or more of the following filters: *Start Date*, *End Date*, *Action*, and *Show History For* (Approvals, Modifications, Integration, Miscellaneous).
  4. Select one of the following from the *Action* drop-down menu: *Blank*, *Approvals*, *Modification*, *Integration*, and *Miscellaneous*.
  5. In the **Show History For** drop-down menu, you may view *Comments* for one specific document or choose **All** to display comments for all of the associated documents. Click the **Apply** button.


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

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

### If The Requester Returns A Cart To You

The *Requester* may decide to **Return A Cart** back to the *Shopper*. Occasionally a *Requester* might have a cart assigned to her by mistake. Or, the *Requester* may want the *Shopper* to provide additional information or select a different *Cost Center* (account number). Instead of asking the *Shopper* to *Unassign* the *shopping cart*, the *Requester* may *return (Return Cart)* the *shopping cart* to the *Shopper*. As a result, the *Shopper* can make the necessary corrections and/or assign it to another person.

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

1. If you are the *Shopper*, to access the returned *shopping cart*, click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**. Look under *My Drafts*. The *Shopping Cart Name* displays the with a **Returned Cart** symbol  next to it.
2. To access the *shopping cart*, click the **Shopping Cart Name**.
3. Click the **Edit Requisition** button and review all of the information on the requisition.
4. Based on the *Requester's* feedback and suggestions, verify/correct the *Ship To Address*, *Cost Center* (account number), and *Natural Account*, etc.
5. Click the **Assign Cart** button.

### Requester Processes Your Returned Requisition From An Approver

An *Approver* may *Return* a requisition to the *Requisitioner* (the person who created the purchase request) 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*. Likewise, both the *Requester* and the *Shopper* will receive the returned requisition in *Draft Carts*. Either may access the requisition and make the necessary revisions. **NOTE:** This should be a coordinated effort between the *Shopper* and the *Requester*.

#### If The Requester Makes Changes:

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

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

#### If the Shopper Makes Changes:

1. To access the requisition, click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**. Look under *My Drafts Assigned to Others*.
2. Click the **Unassign** button for the returned requisition.
3. Click **Edit Requisition**, make the necessary revisions, and click the **Assign Cart** button.
4. Verify the *Assignee* is correct, or select a different *Assignee*.
5. Enter an optional **Note** to the *Assignee* and click the **Assign** button.

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



### A Rejected Requisition: The Entire Requisition OR A Line Item?

An *Approver* may *Reject* a requisition OR one (or more) line items on the requisition. If part of a requisition is *Rejected*, the remaining line items continue in the *Approval Workflow Process*.


#### The Approver Rejected The Entire Requisition

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

1. Click the **Orders & Documents** icon, hover over **Document Search**, and click **Search Documents**.
2. Click the **My Requisitions** link (located under the *document search* field). The *Status* displays the *Requisition Rejected* symbol. ❌
3. Click the **Requisition Number** to open it.
4. For additional details, click the **View Approvals** tab or click the **History** tab. All of the *Comments* and *History* will display.


#### The Approver Rejected One Or More Line Items

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

1. Click the **Orders & Documents** icon, hover over **Document Search**, and click **Search Documents**.
2. Click the **My Requisitions** link (located under the *document search* field). The *Status* displays the *Approved But Line Item Rejected* symbol. 
3. Click the **Requisition Number** to open it.
4. Click the **Summary** tab.
5. Scroll down to view the rejected line item. The item displays the *Rejected Line Item* symbol. ❌ The *Requisition* has completed this approval step and will move to the next workflow requirement.
6. For additional details, click the **View Approvals** tab or click the **History** tab.

#### The Approver Placed The Requisition On Hold

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

1. Click the **Orders & Documents** icon, hover over **Document Search**, and click **Search Documents**.
2. Click the **My Requisitions** link (located under the *document search* field). The *Status* displays the *Requisition Pending Approval* symbol. 
3. Click the **Requisition Number** to open it.
4. To view the approval workflow process, click the **View Approvals** tab.
5. You will see "**Hold**" displayed in the *Dept. Acct. Approval* folder. The name of the *Approver* who placed the requisition on hold will also display.

### Where Are My Shopping Carts?

1. To access your *Draft Carts* (*shopping carts* that have not yet been assigned to a *Requester*), click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**. Look under *My Drafts*.
2. Your *shopping carts* will be listed by *Cart Number* (requisition number), *Shopping Cart Name*, *Date Created*, *Cart Description*, and *Total*.
3. To open a specific draft *shopping cart*, click the appropriate **Shopping Cart Name**.
4. After you *assign* your cart, it will be listed under *My Drafts Assigned To Others*. To access it, click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**. Look under *My Drafts Assigned To Others*.
5. After your cart has been *submitted* by your *Requester*, it becomes an official requisition. You may view it by clicking the **Orders & Documents** icon, hover over **Document Search**, and click **Search Documents**.
6. Click the **My Requisitions** link (located under the *document search* field).
7. Click the **Requisition Number** to open it.

#### Modify The Shopping Cart

You may *Unassign* the *shopping cart* only until the *Requester* has submitted it.

1. Click the **Shop** icon, hover over **My Carts And Orders**, and click **View Draft Shopping Carts**.
2. Under *My Drafts Assigned To Others*, click the **Unassign** button for the appropriate requisition.
3. Click **Edit Requisition**, make the necessary revisions, and click the **Assign Cart** button.
4. Verify the *Assignee* is correct, or select a different *Assignee*.
5. Enter an optional **Note** to the *Assignee* and click the **Assign** button.

**NOTE:** Once the cart has been submitted by the *Requester*, you may ask the *Approver* to *Return* (the requisition) *To Requisitioner*.

## Invoice Approvals

As a *Shopper*, you may be required to *Approve* an invoice for a services purchase order (excluding a purchase order derived from a Direct Payment Form) so the invoice can be paid. There are two instances when the system will automatically require the *shopper* to approve an Invoice before payment is made. Both instances follow the same invoice approval steps:

### Approve An Invoice For A Service Purchase Order

**Accounts Payable requires the Shopper to approve an invoice for a service purchase order greater than \$500 and less than \$10,000.** The purchase order will require invoice approval if the invoice uses any of the following *Natural Accounts*: 179000, 184000, 186000, 189000, 611100, 612100, 797000, 797100, 920000, 930000, 971000, and 971100. You will receive an email informing you that an invoice approval is required. Click the link in the email. It will launch the appropriate approval screen in BobcatBUY. **The purchase order will require invoice approval if the invoice uses any of the following *Natural Accounts*:**

<b>179000</b> Human Subjects	<b>612100</b> Grounds Repair Contractor
<b>184000</b> Consultants	<b>797000</b> First 25000 of Subcontracts
<b>186000</b> Officials for Athletic Events	<b>797100</b> Bal of Subcontract Over 25000
<b>189000</b> Other Professional Services	<b>920000</b> Other Capital Improvements
<b>611100</b> Building Eq Repairs Contractor	<b>930000</b> Buildings

### Approve An Invoice For All Purchase Orders And Direct Payments $\geq$ \$10,000

**This process includes ALL *Natural Accounts*.**

1. Click the **Action Items** link (top right).
2. To view the list of invoices, click the **Invoices To Approve** link.
3. Click the **Voucher Number** to open it.
4. Or you may review the invoice workflow by performing a *Quick Search*.
5. **Once the voucher is open, verify that you received the services/products. Upon verification, you may complete several actions before approving the invoice.**
6. If a number (#) is displayed in the *Comments* tab, click the **Comments** tab to review the comments.
7. To add your own *Comment*, click the **Comments** tab and click the **Add Comment** button. Enter your *Comment* text.
8. You may also email your comment to the shopper, requester, or any BobcatBUY user. Click the checkbox next to the *name* of the person that you would like to email your comment to.
9. To add an *Attachment*, under the *Attachment Type* list, select **File**. Enter a **File Name** and click **Browse** to navigate to where your file is saved. **Double-click** the file that you would like to *attach*. Repeat this process if you have more than one document to attach.
10. Click the **Add Comment** button. **WARNING: When you add a comment, it cannot be removed.**
11. To remove an *Attachment*, click the **Remove** link next to the *Attachment* that you would like to remove and click **Remove**.
12. To add a Note to History, click in the *Available Actions* drop-down list, select **Add Notes To History**, and click **Go**. Enter your *note* and click the **Attach** button.

13. If a number (#) is displayed in the *Attachments* tab, click the **Attachments** tab to review the attached document. Click on the *Attachment* to open it. Review the details in order to decide whether or not the services/products were rendered.
14. Click in the *Available Actions* drop-down list, select **Approve/Complete Step**, and click **Go**. After the invoice has been approved, you will receive an email indicating the *workflow* has completed.

**NOTE: Do not use the Remove Notifications or Remove All Notifications options in the Available Actions drop-down list. If there are notifications attached to an invoice, do not remove them.**

15. To view the approved invoice, click the **Orders & Documents** icon, hover over **Approvals**, and click **My Recent Approvals**.

### 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. If you reject an invoice for payment, it is your department's responsibility to contact the supplier to request a new invoice with the corrected invoice details/total.

1. Click the **Action Items** link (top right).
2. To view the list of invoices, click the **Invoices To Approve** link.
3. Click the **Voucher Number** to open it.
5. Click in the *Available Actions* drop-down list, select **Reject/Cancel**, and click **Go**.
6. Enter your *Reject Reason* in the textbox and click the **Reject/Cancel** button. The screen will return to the open voucher.
7. Click the **Approvals** tab to view the workflow. You will also receive an email indicating the *rejection* was processed.
8. In the *Orientation* field, select whether you want the workflow steps to display **Horizontal** (left to right) or **Vertical** (top to bottom).
9. To process the next invoice, click the **Return to Approvals** link.

### Forward An Invoice

You may be the BobcatBUY user that created the purchase request on behalf of someone else. If you did not work with the supplier, you would be unable 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.

1. Click the **Action Items** link (top right).
2. To view the list of invoices, click the **Invoices To Approve** link.
3. Click the **Voucher Number** to open it.
5. Click in the *Available Actions* drop-down list, select **Forward...**, and click **Go**.
6. 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 **Search**.
7. Next to the desired *Name*, click the **Select** link.
8. Enter a *Note/reason for forwarding* to the individual that will approve the invoice, and click the **Forward** button.
9. Click the **Approvals** tab to view the workflow.

10. In the *Orientation* field, select whether you want the workflow steps to display **Horizontal** (left to right) or **Vertical** (top to bottom).
11. To view the complete *History* of the invoice, click the **History** tab.
12. To process the next invoice, click the **Return to Approvals** link.

#### View All Invoices That Have Been Processed

1. To view approved invoices, click the **Accounts Payable** icon and click **AP Dashboard**.
2. Click the **Invoice Approval Outbox** link.
3. You may hover over the icon to the left of the *Voucher Number*. A pop-up message will display the status of the invoice: Pending, Completed, Rejected, or Partially Rejected.
4. To sort the invoices, in the *Sort By* field, click the down-arrow and select the desired feature.
5. To refine your search results, use the *Filtered By* section (n the left).
6. Click the **Voucher Number** to open it.
7. To view the workflow, click the Approvals tab
8. Click the **Approvals** tab to view the workflow.
9. In the *Orientation* field, select whether you want the workflow steps to display **Horizontal** (left to right) or **Vertical** (top to bottom).
10. To view the complete *History* of the invoice, click the **History** tab.

#### Invoice Payment Status And Other Payment Information

1. To view approved invoices, click the **Accounts Payable** icon and click **AP Dashboard**.
2. In the *Search* field, enter the **Invoice Number** and click **Go**.
3. Click the invoice's **Document Number** to open it.
4. To see if the invoice has been paid, click the **Buyer Invoice** tab, click the **Summary** tab, and look under the *General* section.
5. If the invoice has not been paid, check the *Due Date*.
6. Click the **Buyer Invoice** tab to view the *Invoice Date* and *Due Date*.
  - **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.
  - **Invoice Date:** The date on the original invoice sent by the Supplier.
  - **Due Date:** The date the check will be either printed or electronically sent. This reflects the *Invoice Date* plus (+) the *Terms* (usually Net 30).
  - **Terms:** The terms under which the invoice will be paid. Most invoices are paid **Net 30**; this means the check will be printed 30 days after the *Invoice Date*.
7. If the invoice has been paid, click the **Buyer Invoice** tab and click the **Payment Information** tab to view the Payment Method, *Check No.*, and *Check Date*.
8. If the status is *In Process*, click the **Approvals** tab. To identify the name of the current approver, click the **View Approvers** link.
9. To view the complete *History* of the invoice, click the **History** tab.

#### 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 *Procure To Pay*, 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: 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.