BearBuy: Requisition Creator Training

Supply Chain Management
Systems Solutions
• Introduction
• Role Overview
  • Who are Requisition Creators?
  • What do they do?
• Responsibilities
  • Data Privacy
  • Manage carts and using submit or assign
  • Requisition Quality
• Worklist/Approvals Terminology
  • Assign to Myself
  • Approve/Complete
  • Return to Shared Folder
  • Return to Submitter
  • Forward to…
  • Add Comment
  • Copy to New Cart
  • Reject
• Resources & Support
Requisition Creator Role Overview

- **Who are Requisition (Req.) Creators?**
  - The Requisition creator is the named delegated authority for purchases of common goods and services under $10,000 (Low Value Purchase Authorization in Business 43).
  - The Requisition Creator is responsible for compliance to UC procurement policy and BearBuy procedures. They have the ability to edit requisition fields.

- **What do they do?**
  - Req. Creators must:
    - Have a solid understanding of Procurement practices and policies that apply to the requisitions being processed.
    - Learn the unit/department’s selected workflow.
    - Confirm the requisition information is the following when it comes to the relevant policy and funding requirements:
      - Accurate
      - Complete
      - Compliant
    - Communicate with other users involved in workflow through comments and attachments.
    - Learn the Org Node assignments that link them to specific worklists for queue management and approval purposes.

*Questions about your department/unit’s processes? Inquire with your department/unit. Also, ask about any exception/special approvals.*
Requisition Creator Responsibilities

- **Data Privacy** – Ensure that requisitions do not contain any sensitive/Personal Identifying Information (PII) such as financial information or anything that could compromise one’s identity.

- **Requisition Quality** – Ensure that requisitions have the proper and correct information to submit:
  - Shipping Address
  - Billing Address
  - Org Node
  - Chartstring / Account Codes
  - Necessary supporting documentation required
Supporting Documentation Requirements

- **Required for all orders:**
  - Certificate of Insurance from Supplier
  - Supplier’s quote or proposal

- **Required if over $10k:**
  - Supplier’s quote or proposal
  - Rejected proposals or quotes

- **Required if applicable:**
  - Statement of Work (if applicable)
  - California Partial Tax Exemption (if applicable)
  - Conflict of Interest form (if a Conflict needs to be disclosed)

- **Required if Federally Funded:**
  - More than $10k UCOP Source Selection & Price Reasonableness (SSPR) Justification Form

- **Required if Non-Federally Funded:**
  - $100k UCOP Source Selection & Price Reasonableness (SSPR) Justification Form
When to Use Buyer Intervention

- Purchases that must be reviewed by a Buyer regardless of dollar amount including, but not limited to:
  - Contracts that require signature
  - UC data at privacy level 3 and 4
  - Software as a Service
  - Consultants
  - Firearms and Explosives
  - Controlled Substances
  - Use of University and department marks and brands
  - Online Services with UC data
  - Or other special considerations

- Check the BearBuy **Buyer Intervention** checkbox inside the BearBuy ordering form.
  - **Please Note:** The Buyer Intervention box does not need to be checked if the purchase is under $10k.
  - Double-check the workflow to make sure that the requisition is not already being routed to a buyer.

- For more information, please visit the **When to Select Buyer Intervention** webpage: https://supplychain.berkeley.edu/when-select-buyer-intervention
Worklist/Approvals Terminology

- **Assign to Myself**
  - Assigns the selected document(s) to the Approvers personal approval folder.
  - Once assigned, you will see your name under the PR Creator step of the workflow.

- **Approve/Complete**
  - Approves the transaction you are reviewing.

- **Return to Shared Folder**
  - Only available if you assigned the transaction to yourself.
  - Returns the transaction to the shared folder(s) so another Approver can review and approve.

- **Return to Submitter**
  - Only available if you assigned the transaction to yourself.
  - Returns the entire requisition to the first person who submitted the cart.
  - Returning the cart moves the requisition from the official workflow to a ‘draft cart’ state only visible and accessible to the Submitter.
  - **Helpful Hint:** When a requisition is returned, the Submitter can view the requisition in their draft carts and edit/re-submit their returned carts.
  - **Best Practice:** When returning a requisition, be sure to add a comment to let the submitter know.
Worklist/Approvals Terminology Continued...

- **Forward to...**
  - Only available if you assigned the transaction to yourself.
  - Allows you to forward this transaction to another Approver.
  - **IMPORTANT:** This delegates your approval authorization to another person who can act in your behalf.

- **Add Comment**
  - Allows you to add a comment to the transaction without having to navigate to the comments tab.
  - **Helpful Hint:** When adding a comment, be sure to check the box next to the email addresses listed so an email notification can be sent once your comment is added. Please be sure to specify actions that need to be taken and by whom.

- **Copy to New Cart**
  - Allows you to copy the cart; however, it is a best practice to **not copy carts**.
  - Copying a cart will also carry over all Chartstring (COA) and prior cost information.
  - If you must copy a cart, please be sure to thoroughly check the requisition for any information that needs to be updated to avoid errors from submitting a requisition with stale/invalid information.

- **Reject**
  - Only available if you assigned the transaction to yourself.
  - Rejects the entire transaction.
  - **Helpful Hint:** When rejecting, be sure to add a comment (see above). For corrections, please use the Return feature.
  - Users cannot edit rejected carts.
  - Users cannot resubmit rejected carts.
Demo Session
Resources & Support

- **BearBuy Website**
- **BearBuy Help Desk**
  - #1 place to go to for support:
    - BearBuy information
    - Recommended best practices
    - Technical assistance
    - Policy related questions
    - Any other BearBuy related inquiries
- **Contact Information**
  - Phone: 510-664-9000 Option 1, Option 2
  - Hours: Mon. – Fri. 8:00am to 5:00pm
  - Email: bearbuyhelp@berkeley.edu
- **Contact Your Buyer**: [https://supplychain.berkeley.edu/procurement/find-your-buyer](https://supplychain.berkeley.edu/procurement/find-your-buyer)
- **Forms**: [https://supplychain.berkeley.edu/procurement/procurement-forms](https://supplychain.berkeley.edu/procurement/procurement-forms)
- **Need assistance with policies? Search here**: [https://policy.ucop.edu/advanced-search.php?action=welcome&op=browse&subject=2&p=5](https://policy.ucop.edu/advanced-search.php?action=welcome&op=browse&subject=2&p=5)
- **New Shoppers Quick Reference Guide** – Tips on setting up your default user settings, going shopping, managing your cart, utilizing the tabs in your reqs/PO’s, and creating a receipt.
- **Special Considerations**: [https://supplychain.berkeley.edu/special-considerations](https://supplychain.berkeley.edu/special-considerations)
- **Starting Your Purchase**: [https://supplychain.berkeley.edu/procurement/starting-your-purchase](https://supplychain.berkeley.edu/procurement/starting-your-purchase)

- Interested in staying informed with BearBuy and other Supply Chain Management related information?
  - **Sign up** to receive our newsletters!
Questions?