BearBUY: Requisition Creator Training
Supply Chain Management
Agenda

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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 over $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)
- **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)

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Questions?