BearBUY: Requisition Creator Training

Supply Chain Management

Berkeley
UNIVERSITY OF CALIFORNIA

Agenda

- 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

Berkeley
UNIVERSITY OF CALIFORNIA

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.
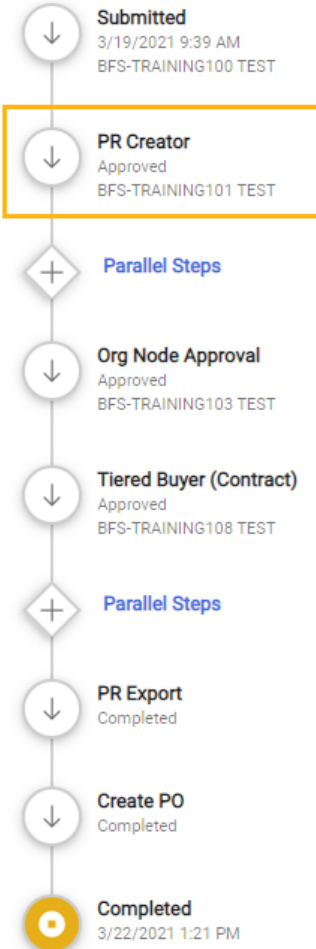
- **What do they do?**
  - Req. Creators must:
    - Have a solid understanding of Procurement practices and policies that apply to the requisitions being processed.
    - Learn the unit/department's selected workflow.
    - Confirm the requisition information is the following when it comes to the relevant 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.

What's next?

Workflow

- **Submitted**
  3/19/2021 9:39 AM
  BFS-TRAINING100 TEST

- **PR Creator**
  Approved
  BFS-TRAINING101 TEST

- **Parallel Steps**

- **Org Node Approval**
  Approved
  BFS-TRAINING103 TEST

- **Tiered Buyer (Contract)**
  Approved
  BFS-TRAINING108 TEST

- **Parallel Steps**

- **PR Export**
  Completed

- **Create PO**
  Completed

- **Completed**
  3/22/2021 1:21 PM

Berkeley
UNIVERSITY OF CALIFORNIA

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

Berkeley
UNIVERSITY OF CALIFORNIA

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

Internal Notes and Attachments

Buyer Intervention Needed ✓

BluCard Holder *no value*

Internal Note *no value*

Internal Attachments Add
[Privacy Warning]

Edit Internal Notes And Attachments ✕

Internal Note

Buyer Intervention Needed ☐

BluCard Holder No Value 🔍

Internal Note
1000 characters remaining expand | clear

Save Changes   Close

Berkeley
UNIVERSITY OF CALIFORNIA

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...

Requisition ▾ : 3232312
- Approve/Complete Step
- Return to Shared Folder
- Place on Hold
- Return to Submitter
- Forward to ...
- Copy to New Cart
- Add Comment
- Add Notes to History
- Reject Requisition

Add Comment ✕

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

☐ BFS-TRAINING101 TEST (Approver) <uit_bb@berkeley.edu>

✓ Riza Casal (Prepared by) <cg_test@berkeley.edu>

1000 characters remaining   expand | clear

- **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.

Berkeley
UNIVERSITY OF CALIFORNIA

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
- **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
- [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
- **Starting Your Purchase:** https://supplychain.berkeley.edu/procurement/starting-your-purchase
- **Additional Resource (If Needed)** – **CA Partial Sales Tax Rate Exemption:** https://controller.berkeley.edu/news/ca-partial-sales-tax-rate-exemption

- Interested in staying informed with BearBUY and other Supply Chain Management related information?
  - [Sign up](#) to receive our newsletters!

Berkeley
UNIVERSITY OF CALIFORNIA