BearBuy: Req/Org Node Approver Training

Supply Chain Management

Systems Solutions

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Agenda

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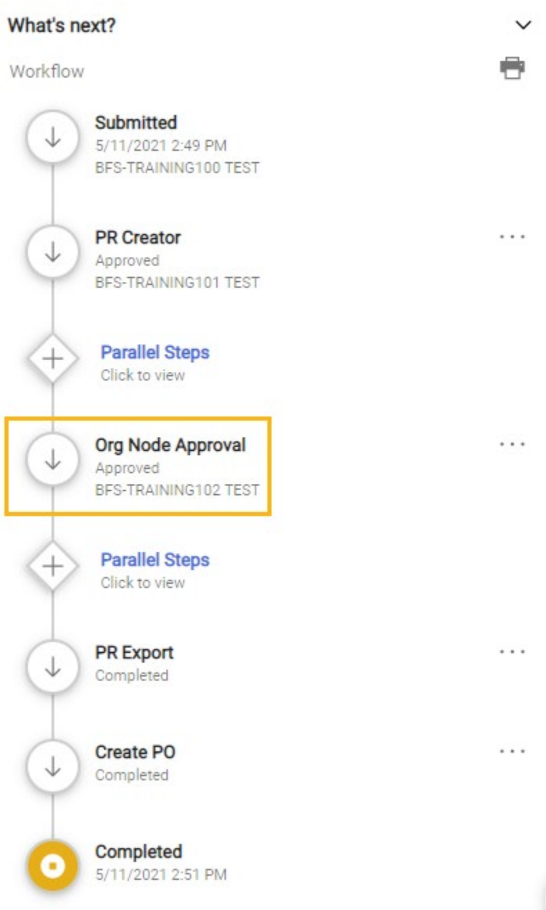
Req/Org Node Approver Role Overview

- **Who are Req/Org Node Approvers?**
  - Req/Org Node Approvers are named delegated authority for:
    - All requisitions that are $1,000 or more, regardless of any authorization activities previously performed in the Additional Authorizer 1 & 2 or Chartfield Authorizer 1 & 2 steps.
    - All Service Type forms, After the Fact, Sub-awards, and Payment Requests.
- **What do they do?**
  - Can only view, approve, and return/reject requisitions.
  - Cannot edit any requisitions fields.
  - Verify:
    - Funds are available
    - Requisition information is correct and complies with policies and procedures.



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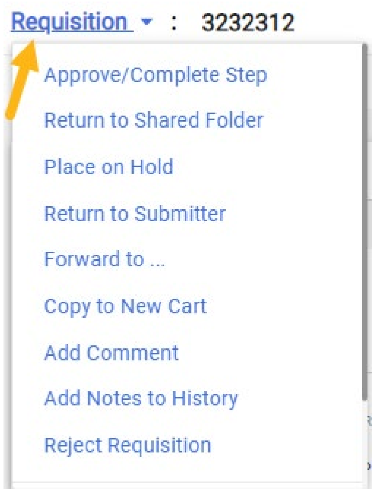
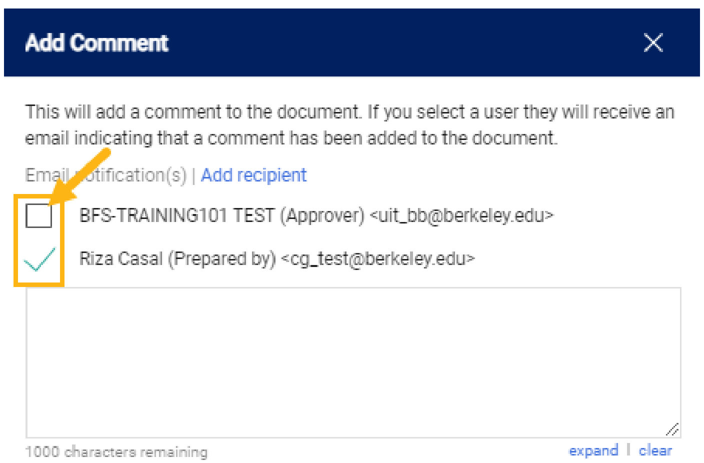
Req/Org Node Approver Responsibilities





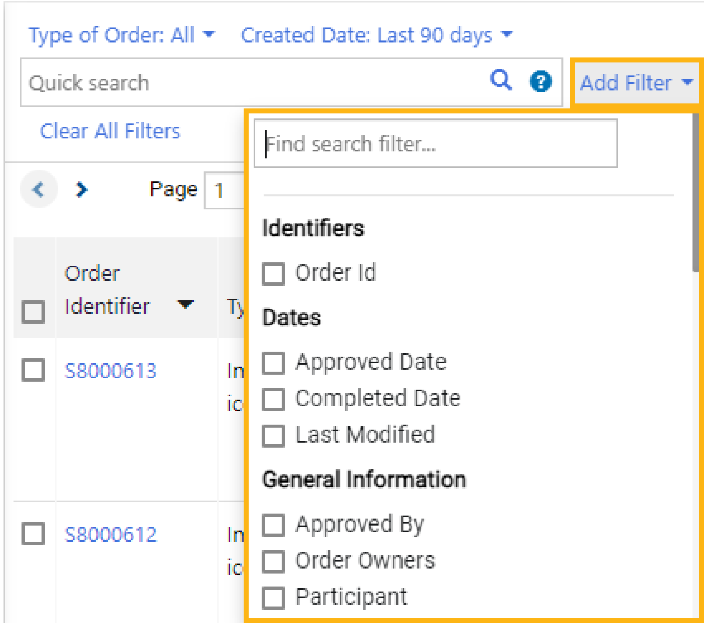
- **Review Comments as a Best Practice:** The comments supplied on the requisition should communicate the business need and purpose of the requisition.
- **Return or Reject a Requisition**
  - RETURN
    - Return the requisition if you have questions about the validity of a purchase. Returned requisitions are returned to the **Submitter.**
    - Add comments describing the reason for the return. This will enable the Submitter to make any corrections or take any necessary action before resubmitting.
  - REJECT
    - Rejecting a requisition results in closing ALL lines on the requisition.
    - Users cannot edit rejected carts.
    - Users cannot submit rejected carts.
    - Partially rejecting a requisition will only reject some lines and approve others.
    - For **corrections,** please use the **Return** feature instead.
    - Add comments describing the reason for the rejection.

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.*

Worklist/Approvals Terminology

- **Accessing Requisitions Pending Review and Approval**
  - Navigate to **Orders | Approvals | Requisitions to Approve**

- **Filter Requisition Approvals**
  - Filters are available using the Elastic Search. You can filter by:
    - Date Range
    - Supplier
    - Current Workflow Step
    - Prepared For
    - Prepared By
    - Status Flags
    - Custom Fields
    - Product Flags
    - Form Type
    - Folders
    - Priority
    - Assigned Approver



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

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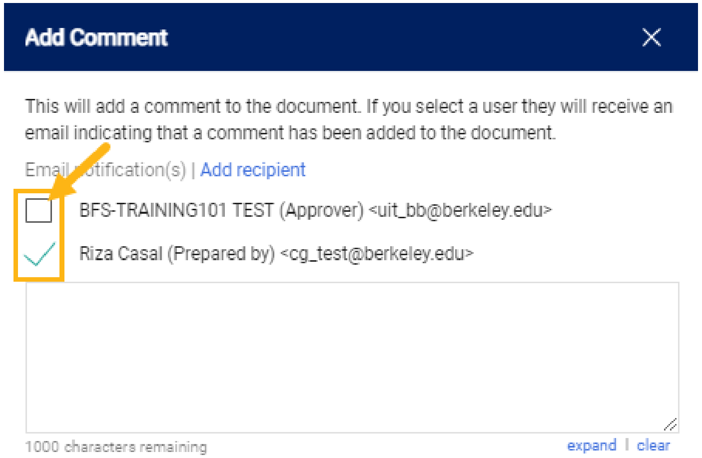
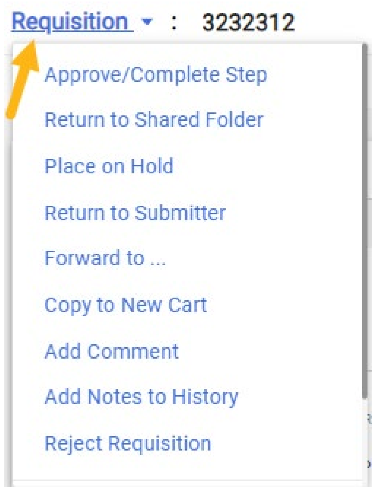
Worklist/Approvals Terminology

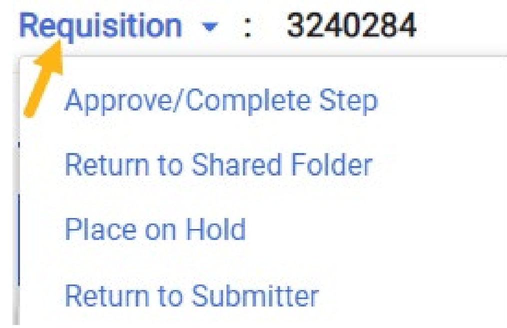


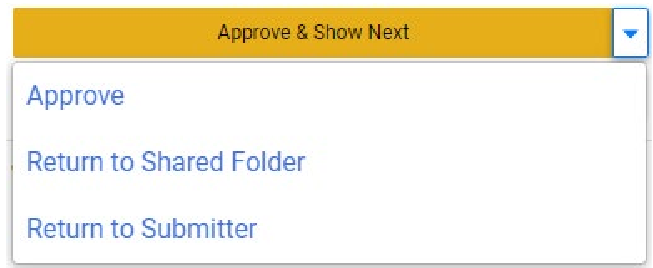


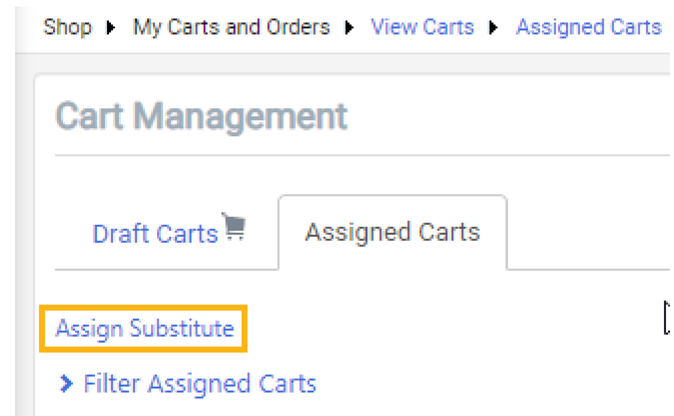
- **Add Comment**
  - Allows you to add a comment to the transaction without having to navigate to the comments tab.
  - **Helpful Hint:** When adding a comment, be sure to check the box next to the email addresses listed so an email notification can be sent once your comment is added. *Please be sure to specify actions that need to be taken and by whom.*
- **Add Attachment**
  - Allows you to add attachment(s) such as supporting documentation to the transaction.
  - Internal (UCB) and/or External (Supplier) attachments.
- **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.

Worklist/Approvals Terminology

- **Approve/Complete**
  - Approves the transaction you are reviewing.
- **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.
- **Assign Substitute Approver**
  - If using this feature to automatically assign any carts that get sent to you to a Substitute Approver on your behalf while being out of office, please do not forget to turn this feature off once you return since there is no way to set an end date and automatically turn it off.
  - Navigate to **Shop | My Carts and Orders | View | Assigned Carts | Assign Substitute**







Friendly Reminder…

- **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

Org Node

Org Node	PR Creator	Org Node Match Exception Preparer	Org Node Match Exception Approver
no value Required	*no value*	*no value*	*no value*

Shipping

Ship To

no address

Required

Billing

Bill To

no address

Draft

Correct these issues.
You are unable to proceed until addressed.

Required: Org Node
Required: Shipping address

Be aware of these issues.
You may review and proceed.

Empty: Account
Empty: Fund
Empty: Department

Accounting Codes

Account	Speedtype	Fund	Federal Funds	Department	Function Code	Chartfield1	Chartfield2
no value Empty	none	*no value* Empty	*no value*	*no value* Empty	*no value*	*no value*	*no value*

Demo Session

Support

- **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

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Resources

- BearBuy Website
- **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!

Questions?

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