## Concepts

BearBuy Requisition Creators must:

➢ Be well versed with procurement practices and policies.
➢ Confirm that all Requisition information is accurate, complete and complies with the relevant policy and funding requirements.
➢ Communicate through internal notes, history, comments, and attachments.
➢ Understand that Org Node assignments link Requisition Creators to specific Approval folder for worklist management and approval purposes.

Accessing Requisition Pending Review and Approval

1. Navigate to **Orders & Documents>Approvals>My Approvals**.
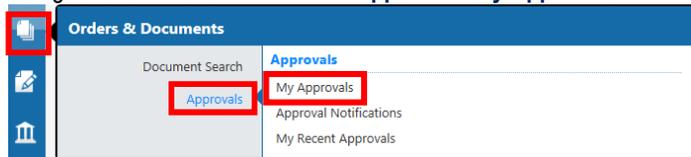
2. From the Worklist Results, select the requisition you wish to work on. You can filter down your worklist.
3. To view transactions that are pending review and approval, select the **Not Assigned** option within the **State** filter.

Note: Numbers next to the filter options represent the number of transactions that fit that criteria.

Assigning Requisition to Myself

1. Navigate to **Orders & Documents>Approvals>My Approvals**.
2. Select a **requisition number**.
3. From the **Available Actions** drop-down, select **Assign to myself** and click **Go**.
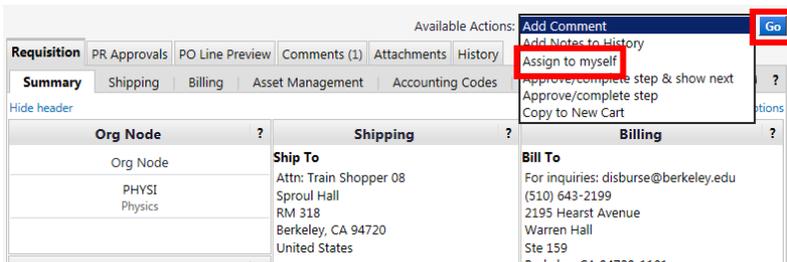
Editing a Field

1. In the assigned **Requisition**, navigate to the **section** you wish to update.
2. If a field is available for editing, you will see an edit **button**. Select **edit**.
3. Update the field as desired and click **Save**.

Adding a Comment

1. In the assigned **Requisition**, navigate to the **Comments** tab.
2. Click **Add Comment**.
3. Enter you comment. Select the individuals to receive your comments via email.
   a. If the individual you wish to select is not listed, select the **add email recipient..**
4. Once you've added your comment and select the appropriate email recipients, click **Add Comment**.

Adding an Attachment

1. In the assigned **Requisition**, navigate to the **Comments** tab.
2. Select **Add Comment**.
3. Select **Browse** within the **File** section.
4. Browse and select the file you wish to attach. Click **Open**.
5. Enter comment if desired, otherwise, select **Add Comment**.

Updating a Ship to Address

1. In the assigned **Requisition**, navigate to the **Shipping** sub-tab.
2. Select **edit** next to **'Ship To'**.
3. To select a new ship to address, select **click here** underneath the Shipping address drop-down.
   a. If you want to select a pre-loaded ship to, select the address from the **Shipping address** drop-down.
4. Click **select from org addresses**.
5. From the pop-up window, enter the **ship to address/nickname.**
   Tip! If you're trying to locate a building on campus, _search by building name_. If you're trying to locate an off-campus building, _search by address_.
6. Click **select** next to the address you wish to use.
7. Once selected, update the **Attn:** name if needed.
8. Click **Save**.

Other Available Actions

In addition to assigning a requisition to yourself and returning a requisition to a shared folder, through the Available Actions drop-down menu you can:

A. **Approve/Complete & Show Next**: Requisition is approved and the next one will appear.
B. **Approve/Complete Step**: Requisition is approved and the screen will remain as is.
C. **Place on Hold**: The Requisition will be marked as 'on hold'. No other action occurs.
D. **Return to Submitter**: Requisition is returned to the first person who clicked Submit.
E. **Forward To…:** Requisition will be sent to the person you designated (must be specified).
F. **Add Comment.**
G. **Add Notes to History**: Similar to add comments.
H. **Copy to New Cart.**
I. **Reject Requisition**: Rejecting requisition prevents the shopper from resubmitting requisition.