



BearBuy User Training: Requisition Creator

Agenda

1. **Introduction**
2. **Concepts & Process Overview**
3. **Hands-On Scenarios**
4. **Resources & Support**
5. **Question and Answer**
6. **Survey**



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INTRODUCTION



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CONCEPTS & PROCESS OVERVIEW

BearBuy Terminology

- Shopper
 - UC Berkeley staff, faculty, Graduate student, and all other student employees are Shoppers.
 - Must have logged into BearBuy once to obtain access.
- Requisition Creator
 - Reviews Requisitions for accuracy and policy compliance.
 - Can edit Requisition fields (Org Node, Ship To Address, Final Destination, Additional Authorizers 1/2, Chart Of Account (COA) fields, form information, etc).
 - Knows the department's Procurement processes.
 - Cannot be the Requisition Creator and Requisition Approver for the same transaction.
- Requisition Approver
 - Reviews Requisition for appropriateness, accuracy, and chartstring assignment.

BearBuy Terminology

- Submit
 - Refers to the BearBuy action required (clicking on the appropriate button) so that BearBuy converts the order from a shopping cart to a requisition.
 - In order to "Submit" an order, Shoppers must know the appropriate Org Node for the order.
- Assign
 - When a shopping cart is routed to another Shopper for authorization prior to the creation of the requisition, this Shopper is referred to as the 'Cart Authorizer'.
- Header level
 - Information populated at the top level that applies to each line on the transaction
- Line level
 - Information populated at the individual line level that only applies to one line.
 - Information populated at the line level will always supersede the header level information.

BearBuy Terminology

- Requisition
 - Request to purchase goods and services are added to carts in BearBuy.
 - Once the cart has been submitted, the cart is called a Requisition (request to purchase).
 - The BearBuy system converts a Requisition into a Purchase Order once it completes approval workflow.
- Purchase Order
 - Legally binding document sent electronically, via fax or email to an external Supplier. A PO is an agreement between UC Berkeley and the Supplier to acquire and provide specified goods or services.
- Voucher
 - Electronic version of a Supplier invoice created in BearBuy
- Receipt
 - Electronic receipts where shipping information is recorded acknowledging receipts of good or services

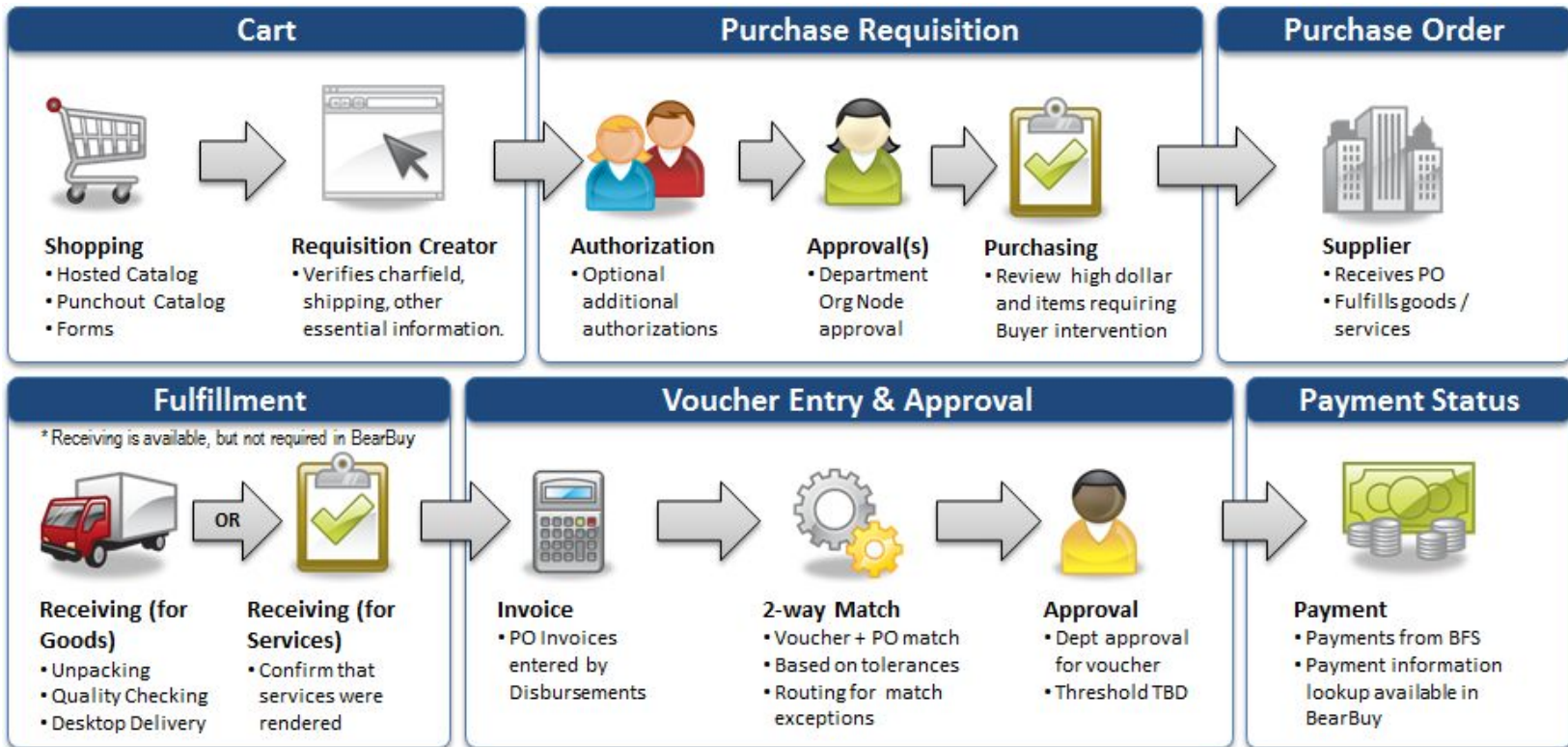
Data Privacy

- DO NOT ADD ON BEARBUY CART, INCLUDING ATTACHMENTS
- What is considered personally identified information (PII)? Anything that contains an **individual's name** or initials *combined with* a:
 - **social security number,**
 - **credit card number,**
 - **driver's license or state identification card number,**
 - any type of **medical or medical insurance information,** or
 - any **personal financial account number.**
 - Full birthdates MM/DD/YY
- Similarly, an individual's **home address and family information** also requires restricted access control.

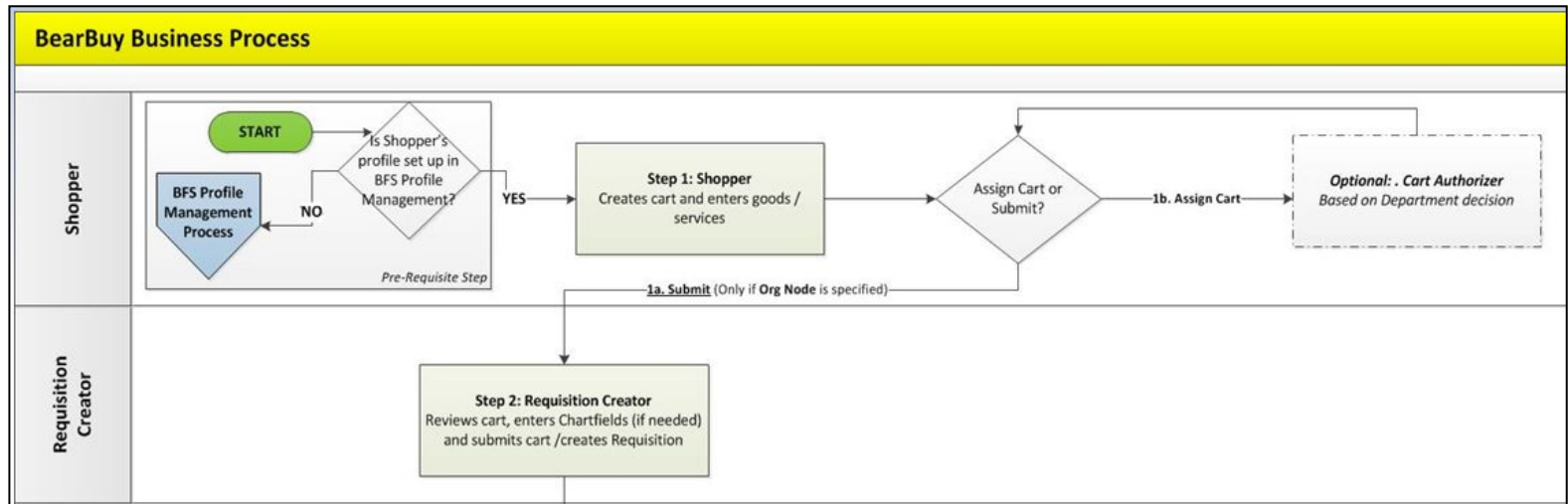
Practices & Procedures

- Self-approval of Requisitions
 - Up to \$1,000
- Auto approval of Vouchers
 - Up to \$1,000
- Exceptions to Auto Approvals
 - Subawards, Payment Requests, Services and After the Fact orders.
- Receiving
 - Best practice: receive in BearBuy, reduces need to store paper documents. Electronic documentation acceptable for audit purposes. Acceptance (not in BearBuy) of goods and services also important.

BearBuy General Workflow Overview



Requisition Creator Overview – User Guide pg. 8



- Have a solid understanding of Procurement practices and policies which apply to the requisitions being process.
- Learn the unit/department's selected workflow.
- Confirm the requisition information is accurate, complete and complies with the relevant policy and **funding** requirements.
- 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.

Responsibilities – User Guide pgs. 5-7

- Data Privacy
- Managing Carts and Using Submit or Assign
- Requisition Quality
- Accounting Codes
- Necessary Documentation
 - ***Always redact*** documents of PII and other sensitive information.
- Encumbrances
- Self-Approval Threshold
- Order Communication
- Tax Calculations

Tax Calculations – User Guide pg. 7

- Tax
 - BearBuy shows items as taxable, but BFS will apply the correct tax calculation. BFS tax value will not be shown in BearBuy.

BearBuy PO

Taxable	✓
Freight Applicable	✗
Commodity Code	12190000 Solvents

BFS PO

Amount Summary	
Merchandise	172.97
Freight/Tax/Misc.	16.00
Total	188.97 USD
Encumbrance Balance	188.97 USD



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SHOPPING HANDS ON TIME

Worklist/Approvals Terminology

- **Assign to myself**
 - Assigns the selected document(s) to the Approver's personal approval folder.
 - Once assigned, the managing approver has "reserved" the document(s) for review.
- **Approve/Complete & Show Next**
 - Approves the transaction you are reviewing and automatically pulls up the next transaction in your folder.
- **Approve/Complete**
 - Approves the transaction you are reviewing and retains the transaction you just approved on screen.
- **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'.
 - Users can edit returned carts
 - Users can re-submit returned carts.

Worklist/Approvals Terminology

- **Forward to...**
 - **Only available if you assigned the transaction to yourself.**
 - Allows you to forward this transaction to another Approver.
 - Please note, if you forward a transaction to someone without the proper workflow role (Requisition Approver, etc) the system will not allow them to take any action.
- **Add Comment**
 - Allows you to add a comment to the transaction without having to navigate to the comments tab
- **Copy to New Cart**
 - Allows you to copy the cart.
 - Copying a cart will also carry over all Chartstring (COA) information.
- **Reject**
 - **Only available if you assigned the transaction to yourself.**
 - Rejects the entire transaction.
 - Users cannot edit rejected carts
 - Users cannot re-submit rejected carts



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REQUISITION CREATOR HANDS ON TIME



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RESOURCES & SUPPORT

Resources

- The BearBuy website is the source for the most up to date news, announcements and training resources
 - supplychain.berkeley.edu/bearbuy.
- BearBuy YouTube Channel - Short demos videos!
 - youtube.com/user/BearBuyProcurement.
 - Subscribe to receive notifications when new videos are posted.



Help Desk

- BearBuy Help Desk #1 place to stop for help:
 - BearBuy information (about BearBuy),
 - Recommended best practices,
 - Technical assistance,
 - Policy related questions, and
 - Much more!
- Contact the BearBuy help desk!
 - (510) 664-9000 Option 1, Option 2
 - Mon-Fri 8 AM to 5PM
 - [Email BearBuy Help](mailto:bearbuyhelp@berkeley.edu) (bearbuyhelp@berkeley.edu)

Questions and Answers!

