**Prepare a Requisition Shopping from Hosted Supplier in BearBuy**

1. Your **BFSv9** Home page might look different, depending on your user access.
   
   Click the **eProcurement** link.

2. **Create a Requisition** is used to prepare requisitions.
   
   Click the **Create Requisition** link.

3. The **Specify Business Unit and Requester** page appears:
   
   This page includes a **Requisition Summary** menu. As we build our requisition the number of lines and the amount will appear, allowing us to keep track of the total amount on the requisition.

4. **Business Unit** default Berkeley is **10000**.
   
   Only 2 Business Units (Berkeley, UCOP) will be used for Requisitions. You can use the Look Up to select the appropriate Business Unit.
   
   In our example, we will leave the default for Berkeley.

5. The **Requester** is the person requesting the goods or services and is the **Requisition Creator**.
   
   The selection of the Requester is important, because the Requester determines how the Workflow Approval is routed.
   
   If a requisition creator prepares requisitions for multiple units; the requester id will be listed for each of those units and the requisition creator would need to select the appropriate id.

6. If you know the Requester ID key it in.
   
   In this example, we will use the **Requester Look Up** feature to find the Requester.
   
   Click the **Look up Requester (Alt+5)** button.

7. We will change the **Logical Operator** as a way to search for a Requester.
   
   Click the **Requester** list.
8. **The Look Up Requester** drop down list appears. It is best to use the "Contains" Logical Operator in order to capture the greatest number of Requesters with that name in it. Click the **contains** list item.

9. **Enter the desired information into the Requester field. Enter a valid value e.g. "Rob".**

10. **Click the Look Up button.**

11. **The Look Up Requester search results appear. We see our Requester, Rob Requester.** Click the **Rob Requester** link.

12. **Click the OK button.**

13. **The Create Requisition home page appears identifying the 3 pages we will use to prepare an eProcurement Requisition.**

   **(1) Define Requisitions:** Allows you to enter the **Line Defaults**, containing Buyer, Category, Vendor, Unit of Measure and Ship To fields. In addition you will populate the Requisition Schedule and Distribution fields from this page. The values you enter will populate the Requisition, but you can later change any of the defaulted information that is different for a particular line.

   **(2) Add Items and Services:** Adds the item and service description for non-catalog requisitions, including the quantity and price and comments to the vendor. This page is also used to access the web link to SciQuest (BearBuy) for catalog requisitions.

   **(3) Review and Submit:** Review the entire eProcurement requisition and edit or submit the requisition for approval.

14. **Notice the Requester Name is populated.**

15. **The Requisition Name is an optional field which can be used to enter a brief description of the goods or services.**

   In this example, we will enter information in this field.

   **Enter the desired information into the Requisition Name field. Enter a valid value e.g. "Wrenches and Pliers"."
16. In order to enter the **Line, Shipping and Accounting Defaults** we need to expand the line.

   Click the **Expand section** button.

17. **Requisition Line Default** is also used when preparing special request requisition when there are no predefined values.

18. In our example we are ordering our supplies from a supplier listed in **BearBuy**; therefore we will not need to select a particular vendor.

   Once our **Shopping Cart** is pulled into BFS, the Vendor Name and Number will default on the requisition.

   Vendors in BearBuy are in the BFSv9 Vendor database.

19. The **Buyer** field allows the department to select a specific buyer.

   This is a very important decision, because if you select the buyer as **Direct To Vendor**, the sourced PO is one that goes directly to the vendor through **SciQuest** thereby streamlining the process.

   When a **Central Campus Buyer** is selected, they are authorized to build the Purchase Order from the requisition and submit to the vendor via e-mail, fax or cXml.

20. Click the **Look up Buyer (Alt+5)** button.

21. In order to look up a **Buyer** we can use either the Buyer field or Name field.

   We will use the **Buyer** field drop down to search.

   Click the **Buyer** list.

22. Change the **Buyer** logical operator by using the drop down button and select "Contains" allowing for a broader buyer search.

   Click the **contains** list item.

23. In this example, we want the Requisition to go **Direct to Vendor** through BearBuy.

   Enter the desired information into the **Buyer** field. Enter a valid value e.g. "Direct".

24. Click the **Look Up** button.
<p>| | |</p>
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<tbody>
<tr>
<td>25.</td>
<td>The <strong>Search Results</strong> appear identifying the Buyer and Buyer Name. Click the <strong>Paul Mulligan</strong> link.</td>
</tr>
<tr>
<td>26.</td>
<td>The <strong>Buyer</strong> name or number will appear. The buyer name is also referenced in the line details.</td>
</tr>
<tr>
<td>27.</td>
<td>The <strong>Category Code</strong> details the type of goods or services you are ordering. See a list of Category Codes at <a href="http://bustechsolutions.berkeley.edu/download/BFSv9CategoryCodes.pdf">http://bustechsolutions.berkeley.edu/download/BFSv9CategoryCodes.pdf</a>. Here at Berkeley we use the Industry Standard Coding System, the <strong>Universal Standard Products and Services Classification</strong> (UNSPSC). In addition, the Commodity Code referenced in BearBuy defaults to the category code in BFSv9. The <strong>Category Code</strong> provides more detailed order information allowing the ability to group types of expenses and track the spending pattern as we more actively manage our expenses and capitalize on vendor discounts.</td>
</tr>
<tr>
<td>28.</td>
<td>The <strong>Category Code</strong> is an important numeric eight digit code. There are approximately 500 Category Codes. When determining the Category Code, it is important to be as precise and accurate as possible because the category code will populate the <strong>Account Code</strong> in the distribution.</td>
</tr>
<tr>
<td>29.</td>
<td>There are 82 different <strong>Unit of measure’s (UOM)</strong> available. In this example we are ordering from BearBuy; therefore the UOM will populate when the order is pulled into BFSv9.</td>
</tr>
<tr>
<td>30.</td>
<td><strong>Shipping Defaults;</strong> The <strong>Ship To Location</strong> code indicates where the goods will be shipped and used. Remember all goods must be received in BFSv9. See the topic, (<em>eProcurement Receiving</em>) for more information.</td>
</tr>
<tr>
<td>31.</td>
<td><strong>Note:</strong> Send an e-mail <a href="mailto:prchhelp@berkeley.edu">prchhelp@berkeley.edu</a> to add additional locations for your department or update existing Ship To or Location Codes.</td>
</tr>
<tr>
<td>32.</td>
<td><strong>Note:</strong> The <strong>Sales Tax</strong> is currently 9.75% for items Shipped to Alameda County. The Sales Tax will reflect on the sourced Purchase Order sent to the vendor.</td>
</tr>
<tr>
<td>33.</td>
<td>Click the <strong>Look up Ship To (Alt+5)</strong> button.</td>
</tr>
</tbody>
</table>
34. The **Look Up Ship** to page appears. We will use the logical operator to find a ship to address.

A **Ship To Location** is listed for each campus building. Each building has a number or name.

Click the **Description** list.

35. Click the **contains** list item.

36. Our goods are being delivered to a unit in the Physics Tool Shop at 2000 Carleton, we will enter a partial **Ship To Description**.

Enter the desired information into the **Description** field. Enter a valid value e.g. "2000".

37. Click the **Look Up** button.

38. The **Search Results** appear referencing both the **Ship to Location** code CARLO02000 and the description.

Click the **2000 Carleton** link.

39. The **Modify Shipping Address** link is used to add additional shipping information if required.

Press [Tab].

40. **Important:** The **Due Date** is the contractual expectant date of receipt of goods and or services from the vendor. Departments should enter a realistic date.

**Example:**

- Services: End of the service contract: contract from 1/110 to 12/31/10 - Due Date is 12/31/10.
- Blanket Order: Last day goods or services should be ordered, but no later than the end of the Fiscal Year - Due Date is 6/30/20XX.

41. We can enter the **Due Date** or use the calendar to designate the date our items need to be delivered.

Enter the desired information into the **Due Date** field. Enter a valid value e.g. "07/15/2010".
42. The **Attention** field is optional. The field is used to enter the specific department staff who the items would be delivered to.

43. In our example, we will enter a department shop technician's name.

Enter the desired information into the **Attention** field. Enter a valid value e.g. "**John Handyman**".

44. **Accounting Defaults** is used to enter the location of where the goods or services will be used and the chart string Distribution.

Note: The location code defaults to the requisition creator's department location, however the location code can be changed.

Click the **Look up Location (Alt+5)** button.

45. Click the **Description** list.

46. Click the **contains** list item.

47. Enter the desired information into the **Description** field. Enter a valid value e.g. "**2000**".

48. Click the **Look Up** button.

49. Click the **2000 Carleton** link.

50. The **Account** Code populates when the requisition is reviewed and is linked to the category code entered on the line defaults.

Press [Tab].

51. **Important**

The order of the **Distribution** chartfield sequence below might look different from yours.

The Chartstring fields, **Class**, **Bud**, **Ref**, **Product**, **Affiliate**, **Fund Affil** we do not use at UCB. To learn how to customize your distribution chart string. See the topic, "**Customize the Distribution Chart String**" for more information.

You will need to **TAB** through to **Chartfield 1** and **Chartfield 2** fields to enter a Project or Flex Code.
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<tr>
<td>52.</td>
<td>Enter the desired information into the <strong>Fund</strong> field. Enter a valid value e.g. &quot;19900&quot;.</td>
</tr>
<tr>
<td>53.</td>
<td>Tab to the <strong>Dept</strong> field. Press [Tab].</td>
</tr>
<tr>
<td>54.</td>
<td>The <strong>Dept</strong> code is the <strong>Org</strong> code. Enter the desired information into the <strong>Dept</strong> field. Enter a valid value e.g. &quot;13050&quot;.</td>
</tr>
<tr>
<td>55.</td>
<td>Tab to the <strong>Program</strong> field. Press [Tab].</td>
</tr>
<tr>
<td>56.</td>
<td>Enter the desired information into the <strong>Program</strong> field. Enter a valid value e.g. &quot;40&quot;.</td>
</tr>
<tr>
<td>57.</td>
<td>The <strong>Lines Defaults</strong> are completed. We have the option to click the <strong>Add Items and Services</strong> link or click the Continue button in order to access the <strong>SciQuest</strong> web link.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Continue</strong> button.</td>
</tr>
<tr>
<td>58.</td>
<td>The <strong>Add Items and Services</strong> page appears with several tabs. <strong>Web</strong> allows users to browse through external merchant Catalogs through the <strong>SciQuest</strong> (BearBuy) portal. <strong>Special Request</strong> allows users to prepare a Special Request requisition when an item can not be found in BearBuy or preparing a reimbursement for out of pocket expense or entertainment requisitions. <strong>Note:</strong> The tabs labeled Catalog, Favorites, Templates and Forms we do not use at UCB.</td>
</tr>
<tr>
<td></td>
<td>Press [Enter] to <strong>continue</strong>.</td>
</tr>
<tr>
<td>59.</td>
<td>In order to access the SciQuest portal link, use the <strong>Web</strong> tab.</td>
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<tr>
<td></td>
<td>Click the <strong>Web</strong> tab.</td>
</tr>
<tr>
<td>60.</td>
<td>The link to the Merchant <strong>SciQuest</strong> is available. We are now ready to access BearBuy in order to catalog shop selecting products from preferred suppliers.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>SciQuest</strong> link.</td>
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</table>
61. We are now linked to the BearBuy Homepage.

This page allows us to shop by Browsing for a specific Supplier, Category, Contract or Chemical or Part Number and add items to a shopping cart.

Notice there are additional links to favorites, forms, carts, history of purchases, profile and user management. See the topic "Adding a Favorite" for more information.

The non-catalog item link is currently not used at Berkeley.

62. Hosted Suppliers are suppliers which may be new or have better pricing.

The featured suppliers rotate monthly. Clicking on a Hosted supplier's logo allows you to search specifically for items from this supplier.

For more information related to Hosted suppliers click on the question mark.

63. Action Items My Orders includes shopping carts which are recently opened, current orders or completed orders.

64. PUNCH-OUT Supplier Catalogs are linked in BearBuy and can be accessed in order to search the supplier’s catalog to purchase products.

Each Punch-Out Supplier's on-line catalog is different and the process to pull a punch-out cart into BearBuy is different.

The Punch-Out Supplier's cart is returned to a Draft Cart in BearBuy and then Returned to BFSv9.

Punch-Out Suppliers do not change and may be at times listed as a Host supplier. For more information regarding this type of supplier click on the question mark.

65. We have the option to limit our search by using the products Shop list.

Click the Shop list.

66. A list of Commodities and Service categories appear which can be used to minimize your search.

67. Note:
Use the Shop field to enter a part number, supplier or commodity. The products which will display are from BearBuy hosted suppliers.

In this example, we will use the Shop field to enter a brief description of the product we want to find. Enter the desired information into the Shop field. Enter a valid value e.g. "Drive Socket Wrenches".
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| 68. | Click the **Go Button** in order to Search for the item.  
  
  Click the **Go** button. |
| 69. | The **Search Results** for wrenches appear. There are 1 of 3 products that best match the search criteria.  
  
  Included in the search results are 3 suppliers; Fisher Scientific, Sigma-Aldrich and Staples Advantage.  
  
  The description of each item, including the **Part Number** and **Manufacturer** and the **Price** and **Unit of Measure** are also referenced. |
| 70. | The **Refine and Filters** the supplier search by Class, Category and Packaging. |
| 71. | The **Favorite** tab allows users to save a product in a BearBuy favorite folder to easily find and order the product again in the future. See the topic (**"Adding a Favorite"**) for more information.  
  
  The **Comparison** tab allows users to compare products by pricing, description or quantity. See the topic (**"Comparison Shopping"**) for more information. |
| 72. | In order to review more about an item click on the **Description** link.  
  
  Click the **Drive Socket, 1/4 - 3/8, Inches/Metric, 40-Piece** link. |
| 73. | The **Product Description** page appears with the product and supplier details; such as the supplier's phone and fax numbers and the url address. |
| 74. | We have the option to add the item to our **Active Cart** by clicking the Go button.  
  
  We can **Close** this page and continue to search for the product we want. |
| 75. | In this example we will use the **Close Button** to return to the results page to continue browsing and complete our order.  
  
  Click the **Close** button. |
| 76. | In this example, we want to add "1" of this item to our cart.  
  
  Scroll to the bottom of the page  
  
  Click the **Add to Cart** button. |
| 77. | The **Shopping Cart** link is tracking the selected items in the cart.  
  
  The Cart Name includes the date, employee ID, the number of items in the cart and the total cart amount and the currency. |
78. We now want to **Search** for Pliers. We will enter the description in the **Shop** field.

Enter the desired information into the **Shop** field. Enter a valid value e.g. "**Pliers**".

79. Click the **Go** button.

80. In our example, we want to purchase the 8-Piece Steel Pliers and Wrench Tool Set.

In order to view a **Larger Image** of the tool set we can either click on the image or the larger Image link.

Click the **larger image** link.

81. The **Enlarged Image** of our pliers set appears. Click on the Image or use the Close button to close the image window.

Click the **Image** to close.

82. In this example, we want to order "**1**" of the selected item and add to our cart.

Click the **Add to Cart** button.

83. In order to review the **Details** for each item in the shopping cart we need to click the Cart link.

Click the **2010-03-29 010448619 | 2 item(s), 21.98 USD** button.

84. The **Supplier Line Item Details** page appears.

The top of the page contains descriptive information about the cart.

**Cart Name** assigns a specific name to this cart. The name can be changed to differentiate the cart from others in cart history.

The **Description** field is **optional**. The Cart Description is used to help you identify the purpose of the order.

**Internal Note** allows shoppers to add an internal note to the requisition creator not the supplier. The internal note is viewed on the requisition creator’s assigned cart. (Limit 1,000 Characters).

**Create Cart** is used to begin a new shopping Cart.
85. The **Supplier/Line Item Details** includes the supplier name, product description, catalog number, packaging, and price, quantity and extended price and total of the order.

The **Commodity Code** 27110000 for Hand Tools is referenced. The Commodity Code populates the **Category Code** when the requisition creator Returns the Cart to BFSv9.

86. The **Supplier / Line Item Details** includes several links.

**Add Products** is used to add more products to the shopping cart.

**Edit Cart** is used to update the items in the current shopping cart; for example deleting an item from the current shopping cart.

**Return to BFS** allows the Requisition Creator to pull the cart items into BFSv9 in order to Review and Submit the Requisition. *(Shoppers will not have this option).*

**Assign Cart** allows either a Requisition Creator or Shopper to assign a cart to a particular requisition creator to complete the requisition in BFSv9.

87. **Shoppers** will not see the Return to BFS link and **are not** able to Return a Shopping Cart to BFSv9.

88. The **Camera Icon** links users to an image of the product.

89. The **More Info** link allows users to view more information regarding this particular product.

90. The **Camera Icon** links users to an image of the product.

91. The **Supplier Line Item Details** page allows us to: **Remove** selected or all items from a cart or **Move** an item to Another Cart.

In order to view the options we would click on the **Selected Line Items** dropdown menu. However in this example we will not use this feature.

92. We have completed reviewing the Supplier Line Item Detail page and want to **Save** this order.

Click the **Save** button.
93. In this example, we are the **Requisition Creator**; therefore we will pull the cart items into BFSv9 by using the **Return to BFS button**.

Returning the cart to BFSv9 will allow the requisition creator to edit the requisition as needed and then submit the requisition for approval.

Click the **Return to BFS** link.

<table>
<thead>
<tr>
<th>94. Note:</th>
<th>The Create Requisition page appears. The <strong>Requisition Summary Menu</strong> summarizes the cart order we pulled in from BearBuy listing the Description, Quantity and Cost for each line.</th>
</tr>
</thead>
</table>

<p>| 95. | In this example, we want to use the <strong>Review and Submit</strong> link to review the lines on the requisition and submit the requisition for approval. Click the <strong>3. Review and Submit</strong> link. |
| 96. | The <strong>Requisition Review and Submit</strong> page appears referencing each requisition line description including the vendor, qty, price and amount. In our example, we want to view the details for line &quot;1&quot;. Click the <strong>Expand Section</strong> button. |
| 97. | The <strong>Line Details</strong> appear for Line 1. The <strong>Account Code</strong> associated with the Category Code has been populated, as well as the <strong>UOM</strong>. We also have the option to Expand Line 2 if needed. |
| 98. | By <strong>Selecting</strong> a specific line or all the lines on the requisition we can; <strong>Modify Line/Shipping/Accounting</strong>, which allows a user to modify/edit the requisition buyer, shipping, delivery date, category code or distribution. <strong>Delete</strong> allows the user to delete a particular line or all lines on the requisition. <strong>Add to Favorites</strong> and <strong>Add to Template(s)</strong> are not used at UCB |</p>
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| 99. | The **Justification/Comments** box allows us to send comments to the Requisition Approver and Central Campus Approver if needed.  

Comments may be sent to the vendor by clicking the Send to Vendor box.  

Any comments we want the Vendor to view on the sourced Purchase Order use the **Additional Line Comments** box on the line details page and click the "Send to Vendor" box in order that the comments print on the Purchase Order. |
| 100. | The bottom of the Review and Submit page allows us to:  

- **Cancel Requisition**, which completely cancels the requisition. If the requisition has been sourced into a PO and dispatched to the vendor, notify the vendor the PO has been cancelled.  

- **Check Budget** invokes budget checking to verify that funds exist in the appropriate accounts to cover the price on the requisition. This option appears if budget checking is enabled for the database. Requisition budget status is either "Not Checked or Valid". |
| 101. | **Save & Submit** the requisition for approval to the requisition approver.  

**Save & Preview Approvals** the requisition will require moving through additional workflow approvals. See the topic, (**"Prepare a Requisition and Add a 2nd Level Approver"**) for more information. |
| 102. | In our example, the requisition line description, details and accounting defaults have been reviewed.  

The requisition is ready to **Save and Submit**.  

Click the **Save & submit** button. |
| 103. | The **Pending Approval** box appears; which allows a user to view the list of appropriate approvers. |
| 104. | The **Requisition Confirmation** Page appears. The option to view the authorized approvers is available.  

This page references the **Requisition ID**, the number of lines on the requisition and the total amount. The requisition is status is **Pending** approval.  

The **Edit** the Requisition button is available to use in order to update the requisition. *Editing a requisition is only before a purchase order is sourced and requires submitting the requisition again for approval.  

The **Check Budget** option is available from this page. |
<table>
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<tr>
<th>Step</th>
<th>Description</th>
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<tbody>
<tr>
<td>105.</td>
<td>Click the <strong>View printable version</strong> link.</td>
</tr>
<tr>
<td>106.</td>
<td>The <strong>Printable Version</strong> of the requisition appears. A copy of the Requisition can be printed from this page by clicking on the Print Requisition link.</td>
</tr>
<tr>
<td>107.</td>
<td>In our example, we want the chartstring distributions to display on each requisition line. Click the <strong>Show Distribution Information</strong> option.</td>
</tr>
<tr>
<td>108.</td>
<td>The <strong>Requisition Page</strong> appears with the chartstring distribution for each line.</td>
</tr>
<tr>
<td>109.</td>
<td>Once the Requisition is approved a Purchase Order is issued directly to the vendor either by fax, e-mail or cXML. In order to view the Purchase Order, See, the eProcurement module <strong>&quot;Manage Requisitions&quot;</strong> to view the requisition Lifespan for more information. <strong>End of Procedure.</strong></td>
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</tbody>
</table>