**Prepare a Requisition Shopping from a Punch-Out Supplier BearBuy**

<table>
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<tr>
<th>Step</th>
<th>Instruction</th>
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</table>
| 1.   | Your **BFS (Berkeley Financial System) Home** page might look different, depending on your user access.  

   Click the **eProcurement** link. |
| 2.   | The **eProcurement** page appears.  

   Use the **Create Requisition** module to begin a requisition.  

   Click the **Create Requisition** link. |
| 3.   | 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. |
| 4.   | If you are the Requester key in your ID.  

   However in this example, we will use the **Requester Look Up** feature to find the Requester.  

   Click the **Look up Requester (Alt+5)** button. |
| 5.   | In this example, we are in a test environment and there is only "1" Requisition Creator listed, however your selection or Requesters will look different.  

   **Note**  
   The logical operator is available to use to look up Requester's by name, id or org node level.  

   Click the **011698349** link. |
| 6.   | Click the **OK** button. |
| 7.   | Click in the **Requisition Name** field. |
8. **The Requisition Name field is optional.** In this example, we want to enter a Requisition Name.

Enter the desired information into the **Requisition Name** field. Enter a valid value e.g. "2 Ergonomic Chairs Admin Asst".

9. In this example we will **Expand** the Line Defaults and enter the Ship To, Due Date, Location Code and Chart string distribution.

Click the **Expand section** button.

10. Enter the desired information "**Direct_To_Vendor**"

11. Click the **Look up Ship To (Alt+5)** button.

12. Click the **Description** list.

13. Click the **contains** list item.

14. In this example, the goods are being delivered to the Valley Life Science Building.

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

15. Click the **Look Up** button.


Click the **Valley Life Science 2101** link.

17. **The Due Date** is important it is a contractual agreement with the supplier to delivery the goods.

Click in the **Due Date** field.

18. Enter the desired information into the **Due Date** field. Enter a valid value e.g. "**06/01/2010**".

19. **The Attention field is optional.** In this example, we want the vendor to send the Chairs to the department's supervisor.

Click in the **Attention** field.
20. Enter the desired information into the **Attention** field. Enter a valid value e.g. "Jane Hemingway".

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

22. Click the **Description** list.

23. Click the **contains** list item.

24. Enter the desired information into the **Description** field. Enter a valid value e.g. "Valley Life".

25. Click the **Look Up** button.

26. Click the **Valley Life Science 2101** link.

27. Press [Tab].

28. The **Account Code** will default from the Category (commodity) Code when the shopping cart is Returned to BFSv9.

29. Enter the desired information into the **Fund** field. Enter a valid value e.g. "19900".

30. Press [Tab].

31. Enter the desired information into the **Dept** field. Enter a valid value e.g. "13050".

32. Press [Tab].

33. Enter the desired information into the **Program** field. Enter a valid value e.g. "40".

34. Use the Continue Button in order to move to the **Add Items and Service** page to access the Web link.

   Click the **Continue** button.
35. Click the **Web** tab.

36. Click the **SciQuest** link.

37. The **BearBuy** Page Home Page appears identifying the users Profile.

38. **Hosted Suppliers** are advertised suppliers who display an online version of the supplier's printed catalog.

   The supplier's product data and details along with pricing information which is added to the cart.

   The showcased Hosted suppliers will change routinely.

39. **Punch-Out** is an external link to a supplier's web-based catalog.

   Allowing departments to the browse and shop from the suppliers catalog, create a shopping cart on the suppliers web site and pull the suppliers shopping cart back into BearBuy in order to Returned the cart items to BFSv9.

   It is possible that a Punch-Out supplier is also advertised as a Hosted Supplier. Punch-Out suppliers do not rotate.

40. **Note:**

   Steelcase is an example of a **Punch-Out Supplier** that has a University Agreement to purchase furniture, therefore all pricing quoted is in compliance with the UC Agreement.

   See the (**Procurement Business Services**) website for more information at:
   http://www.ucop.edu/purchserv/access.php

41. In this example, we want to **Punch-Out** to the Steelcase suppliers catalog to order the ergonomic chairs.

   Click the **Steelcase** object.

42. The **Steelcase Shop** Page appears.

   This page identifies us as UC Berkeley Shoppers.
   The Search option is also available to browse through the Steelcase catalog.
43. In this example, a number of SteelCase Chairs are already highlighted. We will select from these, however we could continue to Search for more options by using the suppliers Search link. Click the Steelcase Criterion Task Chair option.

44. The Steelcase Options page appears. The Chair Image includes selection options for the Back Size, Arms and Color selection available. Also included is the chair description and price estimate.

45. In this example, we want to select the High Back size. Click the High Back option.

46. In our example, we want the Chair with Arms for ergonomic comfort. Click the With Arms option.

47. The Upholstery Color Selection for Chairs is referenced. Click the Plum option.

48. Enter the desired information into the Quantity field. Enter a valid value e.g. "2".

49. Important:
We are on the Steelcase Supplier's On-Line Catalog page. However there are various Punch-Out Suppliers available in BearBuy. Each Punch-Out supplier's on-line catalog ordering process may differ.

50. In this example, we are adding our items to the Punch-Out supplier Steelcase's cart, not the Shopping Cart in BearBuy. Click the ADD TO CART button.

51. The Cart Items and Subtotal are listed. Use the Go To Cart link to view the Steelcase Cart. Click the Go To Cart link.
52. The **Steelcase Shopping Cart** page appears.

   This page identifies the Product Description, Qty, List Price and the UC Customer Price.

53. In addition the **Steelcase Shopping Cart** page has the option to Add or View Notes, Edit or Delete an item from the Shopping Cart.

54. The **Cancel Punch-Out** link is available to cancel this order and return to BearBuy.

55. In the example, we want to use the Steelcase **Submit To Procurement** link

   The SteelCase Shopping Cart will be submitted to BearBuy and will be in My Active draft carts.

   Click the **SUBMIT TO PROCUREMENT** link.

56. The BearBuy **Supplier/Line Item Details** page appears in active carts.

   1) The **Cart Name** and date are referenced, a suggestion is to change the cart name to a unique name to easily identify an order.

   2) The **Commodity Code** 56000000 for Furniture and Furnishings is referenced.

   3) The **Commodity Code Number** will populate the Requisition Category Code and the Account Code default when the Cart is Returned to BFSv9.

57. In this example, we want to use the option to enter a brief Cart Description.

   Enter the **Cart Description Physics Admin's Ergo Chairs**.

58. The **Notes** entered here can be viewed by the Requisition Creator when they review their Draft Carts.

   Click the **add note...** link.

59. The **Cart Add Notes** box appears, this box can be expanded if needed.

   Enter the desired information into the **expand** field. Enter a valid value e.g. "**Need Chairs Delivered Before 6/1/2010**".

60. Click the **Return to BFS** link.

61. The **Requisition Summary** menu identifies the 2 Chairs and the Cost.

62. In order to view the **Details** for Lines we need to Expand the Line.

   Click the **Criterion chair, high back, he** option.
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<tr>
<th>63.</th>
<th>Click the <strong>Expand Section</strong> button.</th>
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<tbody>
<tr>
<td>64.</td>
<td><strong>Note:</strong></td>
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<tr>
<td></td>
<td>The <strong>Account Code</strong> has defaulted, however if needed we can change the Account code or any part of the Distribution.</td>
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<tr>
<td>65.</td>
<td>Click the <strong>Collapse Section</strong> button.</td>
</tr>
<tr>
<td>66.</td>
<td>Click the <strong>Save &amp; submit</strong> button.</td>
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<tr>
<td>67.</td>
<td>The <strong>Confirmation</strong> page appears.</td>
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<tr>
<td></td>
<td>The Requisition ID 000000360, Amount and Requisition Name appear. The Status is Pending and the Approver box appears.</td>
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<tr>
<td></td>
<td>In order to view the Level One ePro Approvers; Click the <strong>Multiple Approvers</strong> link.</td>
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<tr>
<td>68.</td>
<td>The <strong>Approver Box</strong> appears. The <strong>Approver Box</strong> appears.</td>
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<tr>
<td></td>
<td>There are 2 Approvers who are authorized to Review and Approve the ePro Requisition.</td>
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<tr>
<td></td>
<td>Click the <strong>Close</strong> button.</td>
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<tr>
<td>69.</td>
<td>Once the ePro Requisition is Approved a Purchase Order will be sourced and sent directly to the supplier Steelcase.</td>
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<td></td>
<td>See, the eProcurement module (<em>Manage Requisition</em>) to search and view the Lifespan of a requisition for more information.</td>
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<td></td>
<td><strong>End of Procedure.</strong></td>
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