Prepare (Non-Catalog) Special Request Requisition

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| 1.   | In order to prepare an eProcurement Requisition we need to open the eProcurement module.  
      | Click the eProcurement link. |
| 2.   | In order to Create an eProcurement Requisition we need to use the Create Requisitions module.  
      | 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.  
      | If a requisition creator prepares requisitions for multiple units; your requester id will be listed for each of those units and would need to select the appropriate id.  
      | In this example, we will use the Requester Look Up feature to find the correct Requester.  
      | Click the Look up Requester (Alt+5) button. |
| 4.   | The Look Up Requester page appears, there are 1 of 29 listed, select the Requester for this order.  
      | In our example, we will select Brenda Lee.  
      | Click the Lee,Brenda link. |
| 5.   | Click the OK button. |
| 6.   | Notice  
      | A Requisition Summary menu appears.  
      | As we build our Requisition the Description, Number of Lines, and the Price of each item will appear, allowing us to track the items and total amount on the Requisition.  
<pre><code>  | Press [Enter]. |
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| 7.   | The **Create Requisition** page appears identifying the 3 pages we will use on our Non-Catalog eProcurement Requisition.  

The first section **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.  

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. |
| 8.   | The **(2nd)** section is the **Add Items and Services** page.  

This is where we will add the Item and Service Description, including the Quantity and Price and Comments. |
| 9.   | The **(3rd)** section is the **Review and Submit** page.  

This page is where we will review the entire requisition.  

This page also allows the option to Edit or Submit the Requisition for Approval. |
| 10.  | The **Define Requisition** page references the Requester's Employee Number and Name.  

Press **[Tab]**. |
| 11.  | The **Requisition Name** is an **optional field** which can be used to enter a brief description.  

In our example, we want to reference that this order is for Professor Depp.  

Enter the desired information into the **Requisition Name** field. Enter a valid value e.g. "**Professor Depp Lab Supplies**". |
| 12.  | **Line Defaults**, populates the requisition line, schedule and chartstring distribution.  

The **Line Default** is the most efficient way to enter this information. Although Lines Defaults populates the requisition you can later change any of the defaulted information. |
| 13.  | We need to use the **Expand** button to view and enter the Line Defaults.  

Click the **Expand section** button. |
| 14.  | The **Requisition Line Default** is used to select a Buyer, assign a vendor and category code and enter the unit of measure.  

If we know the vendor number we can key in the vendor number including the leading zeros.  

In this example, we will search for the vendor **Fisher Research Development**.  

Click the **Vendor Lookup** button. |
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| 15.  | **The Vendor Search** page appears. You may not know exactly how the **Vendor Name** was entered into the BFSv9 vendor database.  
In that case, enter the first part of the name, or if the vendor is an individual enter the **last name** to find vendor names that match.  
Employee's and Student Vendor numbers are their Employee or Student ID.  
The add/update vendor information is located at [http://www.bai.berkeley.edu/announce/2010/SummaryVendoringChanges.html](http://www.bai.berkeley.edu/announce/2010/SummaryVendoringChanges.html) |
| 16.  | **The Vendor Search** allows you to search the entire vendor database by Vendor ID or Name.  
In this example, we will use the **Name** field to find the vendor **Fisher Research Development**.  
Enter the desired information into the **Name** field. Enter a valid value e.g. "FISHER". |
| 17.  | In order to **Find Vendors** who contain the name **Fisher** we need to search by using the Find button.  
Click the **Find** button. |
| 18.  | **The Vendor Search** results for any vendor name that includes Fisher appears below.  
There are 1 of 18 items listed, we want to view all the names in order to find our Vendor.  
Click the **View All** link. |
| 19.  | In this example, we want to place our order with **Fisher Research Development Inc.**  
The vendor list includes the Vendor ID Number, Remit Address, City and State.  
Click the **0000692939** link. |
| 20.  | Click the **Vendor Detail** button to view the status of the vendor.  
Click the **Vendor Detail** button. |
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| 21.  | The **Vendor Lookup Details** page appears. The vendor must be **Approved** and **Open** for ordering in order to prepare the requisition.  
If the Vendor is **not** Open for Ordering or the status is Un-Approved, you will need to contact the Vendor Department at [ven.bsvm@berkeley.edu](mailto:ven.bsvm@berkeley.edu).  
See **"Vendoring"** for more information.  
Press [Enter]. |
| 22.  | The Vendor is both Open and Approved for ordering. We want to return to the **Define Requisition** page.  
Click the **Return to Define Requisition** link. |
| 23.  | 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.  
If a **Central Campus Buyer** is selected, they are authorized to build the purchase order from this requisition. In either case, requisitions will need approval. |
| 24.  | Click the **Look up Buyer (Alt+5)** button. |
| 25.  | In order to look up a **Buyer**, we can use either the Buyer field or Name field.  
We will use the **Buyer** field to search.  
Click the **Buyer** list. |
| 26.  | Change the **Buyer** logical operator by using the drop down button and select **"Contains"**.  
In this way any Vendor with "Direct" in the name will appear, allowing the broader buyer search.  
Click the **contains** list item. |
| 27.  | In this example, we want the Requisition to Go **Directly** to the Vendor.  
**Although**: this is Non-Catalog order, once the Purchase Order is sourced, the Purchase Order can be sent Directly to the vendor through the integration between SciQuest and BFSv9.  
Enter the desired information into the **Buyer** field. Enter a valid value e.g. "Direct". |
<p>| 28.  | Click the <strong>Look Up</strong> button. |</p>
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| 29. | The **Search Results** appear identifying the Buyer and Buyer Name.  
Click the **Direct To Vendor** link. |
| 30. | The **Buyer** Name or Number will appear.  
Press *[Tab]*. |
| 31. | The **Category Code** is an important numeric eight digit code. There are 500 category codes and each is associated with a UCB account code, which will populate in the distribution chartstring.  
If you know the Category code designation, key it in. In this example, we will use the **Category Look Up** glass.  
In this example, we will use the Category Look up. |
| 32. | The **Look Up Category** page allows you to search by either Category Code or Description Name. We will use the drop down menu to view our choices.  
Click the **Search By** list. |
| 33. | In this example, we want to search for category by **Description**.  
Click the **Description** list item. |
| 34. | In this example, we want to search for the Category for Laboratory Supplies.  
Enter the desired information into the **Find** field. Enter a valid value e.g. "Lab". |
| 35. | Click the **Find** button. |
| 36. | The **Search Results** page appears. There are 2 **Category** codes, the category we want to use is 41120000.  
You can click on the **Category Number** or the **Description**; In our exercise, we will click the Description.  
Click the **Laboratory supplies fixtures** link. |
| 37. | There are 82 different **Unit of measure (UOM)** available. In our example, we will enter the UOM because it is easy and we know it.  
Enter the desired information into the **Unit of Measure** field. Enter a valid value e.g. "EA". |
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| 38.  | **Shipping Defaults.**  
The **Ship To Location** code indicates where the goods will be shipped. Remember that all items must be received online in BFSv9.  
A **Ship To Location** is listed for each campus building. Each building has a number or name. The Ship to Location code is the first 5 letters of the building and the room number. |
| 39.  | **Note:**  
If you need to update existing Ship To or Locations codes or add a new Location code e-mail prchhelp@berkeley.edu |
| 40.  | In our example, we will look for Ship To Locations with the name **University.**  
The **Ship To Location** is also associated with the **Sales Tax,** which is currently **9.75%** for goods Shipped to Alameda County.  
The Sales Tax will reflect on the sourced Purchase Order sent to the vendor.  
Click the **Look up Ship To (Alt+5)** button. |
| 41.  | The **Look Up Ship** to page appears. We will use the logical operator to find a ship to address.  
Click the **Description** list. |
| 42.  | Click the **contains** list item. |
| 43.  | Our goods are being delivered to a unit in the Physics department, we will enter a partial **Ship To Description.**  
Enter the desired information into the **Description** field. Enter a valid value e.g. "Life Science". |
| 44.  | Click the **Look Up** button. |
| 45.  | The **Search Results** appear, referencing both the **Ship to Location** code VALLE02101 and the description.  
Click the **Valley Life Science 2101** link. |
### Step 46.

**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:**

- **Goods:** User expects goods on 5/31 - Due 5/31/2010.
- **Services:** End of service contract: contract from 1/1/10 - Due Date is 12/31/10.
- **Blanket Orders:** Last day goods or services should be ordered, but no later than the end of the Fiscal Year - Due Date is 6/30/20XX

Enter the desired information into the **Due Date** field. Enter a valid value e.g. "07/15/2010".

### Step 47.

The **Attention Field** is used to enter the specific department staff name who will receive the goods.

In this example we are not using this field.

Press [Tab].

### Step 48.

**Accounting Defaults** is used to enter the chartstring distribution and the **Location** of where the goods or services will be used.

The location default is linked to the requester but can be changed if needed.

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

### Step 49.

The **Look Up Location** page allows us to search by Location code or Description.

In this example, we will use the **Description Logical Operator**.

Click the **Description** list.

### Step 50.

Click the **contains** list item.

### Step 51.

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

### Step 52.

Click the **Look Up** button.

### Step 53.

The **Search Results** appear the Location code is listed with Description.

Click the **Valley Life Science 2101** link.
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| 54. | We need to enter the remaining **chartstring distribution**.  
The **Account Code** linked to the category code will populate as we move through the requisition.  
Press [Tab]. |
| 55. | Enter the desired information into the **Fund** field. Enter a valid value e.g. "19900". |
| 56. | Press [Tab]. |
| 57. | The **Dept** is used to enter the Org Code.  
Enter the desired information into the **Dept** field. Enter a valid value e.g. "13050". |
| 58. | Press [Tab]. |
| 59. | Enter the desired information into the **Program** field. Enter a valid value e.g. "40". |
| 60. | Scroll to the right to enter **Chart field 1** (project code) and **Chart field 2** (flex code).  
**Note:** We do not use the Class, Bud Ref, Product, Affiliate or Fund Affiliate fields at UCB |
| 61. | **ChartField 1** enter the Project Code.  
Click in the **ChartField 1** field. |
| 62. | Enter the desired information into the **ChartField 1** field. Enter a valid value e.g. "3SPHMW". |
| 63. | Press [Tab]. |
| 64. | **ChartField 2** is the Flex code.  
Enter the desired information into the **ChartField 2** field. Enter a valid value e.g. "PHMJJW". |
| 65. | The **Add Items and Services** page allows us to enter our Item or Service Description, Price and Comments.  
Click the **2. Add Items and Services** link at the top of the page. **2. Add Items and Services** |
| 66. | Click the **Special Request** tab. **Special Request** |
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| 67.  | **Action:** The **Add Items and Services** page appears.  
Because we are preparing a Non-Catalog order we need to **Select a Request Type**.

The other links we do not use at UCB

Click the **Special Item** link. |
| 68.  | In this example, we will enter the **Item Description**, Price, Quantity.  
Enter the desired information into the **Item Description** field. Enter a valid value e.g. "Portable Laboratory Sink". |
| 69.  | Press **[Tab]**. |
| 70.  | Enter the desired information into the **Price** field. Enter a valid value e.g. "699.99". |
| 71.  | Press **[Tab]**. |
| 72.  | Enter the desired information into the **Quantity** field. Enter a valid value e.g. "1.00". |
| 73.  | Press **[Tab]**. |
| 74.  | **Important**  
There are some **BearBuy Catalog** Suppliers who can not receive comments on a PO.

See the list of BearBuy Catalog suppliers who can not receive comments on the printed PO. If the department has **Additional Comments** for a particular BearBuy Catalog supplier they will need to contact the Supplier directly. |
| 75.  | **Scroll Down** to the bottom of the Page to **Add the Item** to our Requisition.  
Click the **Add Item** button. |
| 76.  | **Notice:**  
The **Requisition Summary Menu** references the line description, quantity and amount of the requisition. |
| 77.  | Enter the **Line 2 Description**.  
Enter the desired information into the **Item Description** field. Enter a valid value e.g. "Faucet Fixtures". |
<p>| 78.  | Enter the desired information into the <strong>Price</strong> field. Enter a valid value e.g. &quot;129.99&quot;. |
| 79.  | Press <strong>[Tab]</strong>. |
| 80.  | Enter the desired information into the <strong>Quantity</strong> field. Enter a valid value e.g. &quot;1.00&quot;. |
| 81.  | Press <strong>[Tab]</strong>. |</p>
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| 82.  | We have finished **Adding** both Line 1 and Line 2 Items.  
Click the **Add Item** button. |
| 83.  | The **Review and Submit** page allows us to view lines of the requisition and to **Save** and **Submit** the requisition for approval.  
Click the **3. Review and Submit** link. |
| 84.  | **Note:**  
The **Requisition Summary Menu** displays the 2 requisition line items and provides the **Total Amount** of the requisition. |
| 85.  | In order to view the details and distribution on line “1” we will expand the line.  
Click the **Expand Section** button. |
| 86.  | The **Requisition Line 1** details appears including the **Account Code** linked to the Category Code. |
| 87.  | The **Save and Submit** button allows the Requisition Approver to review and approve the requisition.  
We also have the option to **Save the Requisition for Preview Approvals**.  
This option allows further review and approval of the requisition, see the topic **“Approve/Deny Requisition”** for more information.  
We also have the option to **Cancel** the Requisition. |
| 88.  | In our example, we are going to **Save & Submit** the requisition.  
Click the **Save & submit** button. |
| 89.  | The **Confirmation** page appears.  
This page details the pending requisition referencing the description, **Requisition ID 0000000194**, and the amount. |
| 90.  | At this point we can view the printable version of the Requisition or we can Edit the Requisition.  
At Berkeley we do not use Check Budget.  
Click the **View printable version** link. |
| 91.  | We wish to view the **Distribution** for each line.  
Click the **Show Distribution Information** option. |
Notice, each Lines Description, Shipping, Qty, Price, Requester and Distribution is referenced.

If, we want a hard copy of the Requisition we would use the **Print Requisition** button.

Click the **Print Requisition** button.

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Once the eProcurement Requisition is **Approved**, a Purchase Order will be Sourced and sent **Directly** to the Vendor through SciQuest.

**End of Procedure.**