Creating Requisitions for Preferred Products in BearBuy

This guide provides a high level overview of:

- Requisitions created using Punch-outs
- Requisitions created using Forms
- Assigning & Un-assigning draft carts to Requesters (applies to Shoppers only)
- Examples. Additional information. Contacts and References

NOTE: This guide does not replace the official BearBuy training materials; please refer to the BearBuy training page on the Supply Chain Management website.

A. REQUISITIONS CREATED USING PUNCH-OUTS

- Punch-outs connect to the supplier’s website containing contract pricing. Punch-out sites retain the look and feel of the regular public website; however, the checkout will result in the products returned to BearBuy and added to the active shopping cart. Follow the supplier’s directions for submitting the items back to BearBuy as each supplier’s site may differ. Product pricing and availability may vary between the supplier’s public and University websites.

1. Log into MyAccess and select the BearBuy link.
   a. By default, you will be directed to the Shopping Home page unless you set your home page to another BearBuy page.
   b. If you are not on the Shopping Home, navigate to Shop > Shopping > Shopping Home.
2. Click the supplier’s icon to begin the Punch-out session.
3. Search in the supplier’s catalog for items and add to the supplier’s shopping cart.
4. Complete shopping on supplier’s site, then return items to the BearBuy shopping cart.

If you are only browsing the Punch-out and are not returning items to BearBuy, you may exit the Punch-out by closing the Punch-out. Click the Cancel Punch-out button in your browser to return to BearBuy.

B. REQUISITIONS CREATED USING FORMS

- Use Forms to create shopping carts for items that are not found in the catalogs. There are several forms, including Non-Catalog, Amount-based PO (blanket), and Payment Request.

1. From the Frequently Used Forms section on the main shopping page, select the appropriate form. Click on the icon and the form description will appear. The description will stay on the page until clicking on another part of the page.

2. Enter all relevant information about the item including Description, Product Number and Unit price. You can copy the details from the “UCSF EH&S Ergonomics Preferred Products List” and paste them into a non-catalog form in BearBuy.

3. Select “Add and go to Cart” from the form’s Available Actions dropdown menu. Click the Go button to add the form to the shopping cart. You will be directed to your cart.

C. ASSIGNING DRAFT CARTS TO REQUESTERS (applies to Shoppers only)

- Once Shoppers are done adding items to their draft carts, they must assign the carts to the desired Requester within their Procurement Department Code.
- Click the Assign Cart button and specify the Requester.
- You can also enter a comment for the Requester if needed. Click the Assign button.

NOTE: Shoppers are not required to enter either Procurement Department Code or other Accounting Codes information. Shoppers can assign their draft carts to Requesters regardless of the errors and warnings displayed in BearBuy.

UNASSIGNING DRAFT CARTS TO REQUESTERS (applies to Shoppers only)

- Assigned carts can be unassigned if you need to make changes to the cart or if you need to change the Requester.
- Use the icons on the left to navigate to Shop > My Carts and Orders > View Draft Shopping Carts.
- Go to “My Drafts Assigned to Others” section and locate the cart.
- Click the Unassign button. The cart will be returned to your My Drafts carts list and you will be directed into the cart.

(Example) PUNCH-OUT ORDERING FROM OFFICE MAX & CDW-G

- Using Part Numbers provided in the “UCSF EH&S Ergonomics Preferred Products List”, search for the products within the corresponding OfficeMax or CDW-G punch-out site.

- After the punch-out cart is returned to BearBuy, you can either “Proceed to Checkout” or “Assign Cart”; Shoppers must always assign cart to Requesters.

HELPFUL TIPS:
- Do not create separate lines for Shipping and Taxes.
- You can combine Punch-out and non-catalog items in one cart.
- You can combine multiple suppliers in one cart.
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(Example) FORM ORDERING FROM CUBE SOLUTIONS

> When placing orders for the vendor Cube Solutions, please use the non-catalog form.

1. Please enter all relevant information about the item including Description, Product Number and Unit price. You can copy the item details from the “UCSF EH&S Ergonomics Preferred Products List” and paste them into the corresponding fields within the non-catalog form in BearBuy.

2. Add the form to your cart by selecting “Add and go to Cart” and clicking “Go” located on the top of the form.

3. After the item(s) is added to your cart, you can either “Proceed to Checkout” or “Assign Cart”; Shoppers must always assign cart to Requesters.

   ➢ Helpful tips:
   - Do not create separate lines for Shipping and Taxes.
   - You can combine punch-out and non-catalog items in one cart.
   - You can combine multiple suppliers in one cart.

ADDITIONAL INFORMATION, CONTACTS & REFERENCES

➢ Additional information:

1. If you use a supplier’s quote, please indicate the quote number within the request and attach the quote to the request.

2. BearBuy “Shoppers” do not have to enter either a Procurement Department Code or Accounting Codes (Speedtype).

3. “Shoppers” must assign their carts to “Requesters”.

4. BearBuy “Requesters” are responsible for providing and/or verifying the required information when finalizing carts. The examples of the required information: Procurement Department Code, Accounting Codes (Speedtype) and Ship-to Address.

➢ Contacts and References:

1. BearBuy questions: for Customer Support, contact the IT Service Desk at 514-4100 (Option 2) or appsupport@ucsf.edu between 8am - 5pm.

2. The BearBuy Training and Quick Reference Guides are located on the Supply Chain Management website: http://supplychain.ucsf.edu/training

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The website links (urls) provided within this guide are subject to change. Please go to the departmental websites directly for the most up-to-date information.