1. Getting Started

2. Hosted & Punchout Catalog Requisition

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5. Receiving for Punchout, Hosted & Non-Catalog Purchase Orders

6. Receiving on Blanket Purchase Orders

7. Change Order Request

8. Consolidating Carts

9. Approving, Disapproving & Rejecting Requisitions
Getting Started

1. **Accessing BearKatBuy** – You will be given instruction on accessing the BearKatBuy by going to the following URL:

   https://usertest.sciquest.com/apps/Router/SAMLAuth/SamHoustonState

2. **Profile Information & Setting**

   Click on your Name in the upper right corner of the Home Page then click on “View My Profile”
   - Review your **Name & Phone**
   - Review **E-mail Address**
   - Review **User Name**

   Click on **Default Users Settings**
   - Review and update **Custom Field & Accounting Code Defaults** – Fund, Org and Program (Banner)
   - Review and update **Default Address** – Ship To Address
   - Establish **Cart Assignees**
     * Instruction will be provided in training

   Click **User Roles & Access**
   - Review **Assigned Roles**
   - Review **Access**

   Click **Permission Settings**
   - Review **Shopping & Cart/Requisition**
   - Review **Orders**
   - Review Approvals

   Click on **Notification Preferences**
   - Review and update **Shopping, Carts & Requisitions**
   - Review and update **Purchase Orders**
   - Other Notification areas may also be applicable
     * Instruction will be provided in training

Please send your questions to the following email:

procurement@shsu.edu
CheatSheet for
Hosted & Punchout Catalog Requisition

1. Click on a Hosted Supplier or a Punchout Supplier on the BearKatBuy Home Screen.

2. If a Punchout catalog is selected the supplier’s shopping website will open.
If Hosted catalog is selected it will stay in BearKatBuy with only that supplier’s items showing up, as illustrated by the Sherwin Williams catalog below.

3. Use the search feature on any of the suppliers' websites to search for the items you would like to purchase.

4. When you have found the items you would like to purchase select the Add to Cart button.
5. At this time the items you have selected will drop into the supplier cart. You can continue shopping if there are more items to purchase or if you have completed your selections click the **Checkout** button.

6. You will then see an option to **Transfer Shopping Cart**. This button will transfer your selected items in the supplier shopping cart back to BearKatBuy.

The following BearKatBuy Shopping Cart opens.
7. If you are done shopping select the **Proceed to Checkout** button on the upper right side of the screen.

![Proceed to Checkout](image)

If you need more items select the **Continue Shopping** icon and repeat steps 1 through 6 until you have all the items added that are needed.

![Continue Shopping](image)

8. Once the Proceed to Checkout button is clicked the following screen will open up:

![Checkout Screen](image)

9. The first tab that will need to be filled in is the **Shipping** information. Click on the **edit** button besides the **Ship To**. If you have a defaulted address it will populate, but you can change it.

<table>
<thead>
<tr>
<th>Shipping</th>
<th>?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ship To</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Shipping address</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Delivery Options</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Ship Via</strong> Best Carrier-Best Way</td>
<td></td>
</tr>
</tbody>
</table>

![Select edit](image)
The following screen will pop up. Click on the **select from org addresses** button.

![Select from org addresses](image)

Then click on the **Search** button.

![Search](image)

Search through the list until you find your department address and hit the **select** button out beside it.
The address information will drop in and you will need to click the **Save** button.

10. The next tab to be filled in is the **Accounting Codes** Tab. Click on the Accounting Code Tab. Click on **required field** below the Fund.
The following will open. Then enter in your department **Fund, Organization, Account, and Program (FOAP)**. **Activity** and **Location** will not be used except for **Grants**. When FOAP is entered then click the save button. Refer to BearKatBuy reference guide to setup default **Accounting Codes** for your department.

If needing to see all available **Accounting Codes** click on **Select from all values**… When Custom Field Search box opens click on search; all available will be displayed

To split an order between multiple **FOAPs**, click on the **edit** button besides the individual line items.

This is the next screen that will appear. Click on the **add split** button to get the option to put in multiple FOAPs.

Under the drop down menu choose the appropriate option.

Fill in your FOAP with the correct corresponding value. Then click on the **Save** button.
11. Adding **Internal Notes & External Notes & Attachments**, see form below.

**Internal Notes and Attachments** will only stay with Requisition and not be forwarded to supplier. These documents need to be only internal SHSU documents. (Emails, etc.)

**External Notes and Attachments** will go from the Requisitions to the Purchase Order and sent out to the supplier when BearKatBuy sends the Purchase Order. Only attach items that the supplier would need to see such as their quote, and/or contracts.

Whatever items are to be attached will already need to be saved to your hard drive or thumb drive as BearKatBuy will ask you to browse for your file to attach.

Click on the add attachment button, select the browse button, select the file to be attached from your drive, and click open.

If needed you can then name your file and click the **Save** button to attach the document.
12. Final step is the **Final Review** Tab. If everything is correct at this point click the **Submit Requisition** button.

Requisition will then be sent on through the approval path and if successfully submitted you will receive the following:
CheatSheet for
Non-Catalog Requisition

1. Click on **Non-Catalog Form** on the BearKatBuy Home Screen. This form is used to purchase items that do not currently have contract pricing (commonly referred to as non-catalog items) and are not a hosted or a punch-out catalog.

2. The **Non-Catalog Form** will open.

3. If supplier is known, key the first several letters supplier name and name will appear, click on name and will be inserted into form. If not known then click on the **supplier search** button.
Supplier search screen will open. If you know the **Suppliers Name** you can type it in the field and select **Search**.

If you do not know the suppliers name click on **Search** button and it will bring up all suppliers

Find the supplier you want to use and click the **select** button on the right side of the screen (Do not select the supplier name, defaults to supplier profile). If no supplier see last section of this document on adding and creating new supplier

If the supplier is not in BearKatBuy enter the word **purchasing** in the Supplier box. Then attach the substitute W-9 and the requisition will route to Disbursements so the new supplier can be entered.

4. Entering items to order

   Go to **General Info** section
   
   Enter a **Product Description** (Limited Text Field of 254 characters) Remember this is what feeds over to the Banner PO, Cognos Reports, & Fixed Assets so describe your purchase with that in mind.
   
   Enter the **Catalog No**.
   
   Select **Packaging** (Unit of Measure) from drop down menu
   
   Enter **Quantity**
   
   Enter **Estimated Unit Price**
   
   Enter **Manufacturer Name** and **Manufacture Part No** (if applicable)
   
   Check **Health and Safety** Icons (if applicable)
5. Adding **Internal & External Notes & Attachments**, see bottom of form.

**Internal Notes and Attachments** will only stay with Requisition and not be forwarded to supplier. These documents need to be only internal SHSU documents. (Emails, written approval memos, etc.)

**External Notes and Attachments** will go from the Requisitions to the Purchase Order and sent out to the supplier when BearKatBuy sends the Purchase Order. Only attach items that the supplier would need to see such as their quote, and/or any contracts or agreements.

Whatever items are to be attached will already need to be saved to your hard drive or thumb drive as BearKatBuy will ask you to browse for your file to attach.

Click on the add attachment button, select the browse button, select the file to be attached from your drive, and click open.

If needed you can then name your file and click the **Save** button to attach the document.

6. On the top right hand side of the screen is the **Available Actions** drop down menu. Select the Add and go to Cart option. Push **Go**.
7. If you are done shopping select the **Proceed to Checkout** button on the upper right side of the screen.

   ![Proceed to Checkout](image)

If you need more items select the **Continue Shopping** icon and repeat steps 1 through 6 until you have all the items added that are needed.

   ![Continue Shopping](image)

8. If an item in the cart needs to be modified click on the **open form** button next to the product description and it will open the form back up for that item to make changes.

   ![Select open form](image)

9. Once the **Proceed to Checkout** button is clicked the following screen will open up:
10. The first tab to be filled in is the **Shipping** information. Click on the **edit** button besides the ship to. If you have a defaulted address it will populate, but you can change it.

<table>
<thead>
<tr>
<th>Shipping</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ship To</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Shipping address</strong></td>
<td><strong>Required field</strong></td>
</tr>
<tr>
<td><strong>Delivery Options</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Ship Via</strong></td>
<td><strong>Best Carrier-Best Way</strong></td>
</tr>
</tbody>
</table>

The following screen will pop up. Click on the **select from org addresses** button.

Then click on the **Search** button.

Search through the list until you find your department address and hit the **select** button out beside it.
The **org address** information will drop in and you will need to click the Save button. Ship to address may be saved for future use.

11. The next tab to be filled in is the **Accounting Codes** tab. Click on the **Accounting Codes** Tab. Click on **required field** below the **Fund**.

Click on the **required field** button below the **Fund**. The following will open.
Enter in your department **Fund, Organization, Account, and Program** (FOAP). Activity and **Location** will not be used except for Grants. When FOAP is entered then click the save button. Refer to BearKatBuy reference guide to setup default **Accounting Codes** for your department.

To split an order between multiple FOAPs, click on the **edit** button besides the individual line items.

This is the next screen that will appear. Click on the **add split** button to get the option to put in multiple FOAPs.

Under the drop down menu choose the appropriate option.

Fill in your FOAP with the correct corresponding value. Then click on the **Save** button.
12. Final step is the **Final Review** Tab. If everything is correct at this point click the **Submit Requisition** button.

Requisition will then be sent on through the approval path and if successfully submitted you will receive the following:
CheatSheet for

*Blanket Order Requisition*

1. Click on **Blanket Order Form** on the BearKatBuy Home Screen

2. The **Blanket Order Form** will open on screen.
3. If supplier is known, key the first several letters supplier name and name will appear, click on name and will be inserted into form. If not known then click on the supplier search button.

Supplier search screen will open. If you know the Suppliers Name you can type it in the field and select Search.

If you do not know the suppliers name click on Search button and it will bring up all suppliers.

Find the supplier you want to use and click the select button on the right side of the screen (Do not select the supplier name, defaults to supplier profile). If no supplier see last section of this document on adding and creating new supplier.

If the supplier is not in BearKatBuy enter the word purchasing in the Supplier box. Then attach the substitute W-9 and the requisition will route to Disbursements so the new supplier can be entered.

4. Entering items to order

   Go down to Product/Services Information.
   Enter a Product Description (Limited Text Field of 254 characters)
   Enter Total Price
   Enter PO Start Date and PO End Date - Period that the Purchase Order is valid.
   Select whether or not this Purchase Order is to be sent to the supplier.
   Fill in the To Our Suppliers section.
If any special **payment instructions** are needed make selection and fill in box.

Under **Responsible Persons Section** enter the department contact person information of person responsible for administering the blanket PO.

5. On the top Right hand side of the screen is the Available Actions Drop Down menu. Select the **Add and go to Cart** option. Push **Go**.

6. If you need more items select the continue shopping icon and repeat steps 3 through 6 until you have all the items added that are needed.

If you are done shopping select the **Proceed to Checkout** button on the upper right side of the screen.

7. If an item in the cart needs to be modified click on the **open form** button next to the product description and it will open the form back up for that item to make changes.
8. Once the **Proceed to Checkout** button is clicked the following screen will open up:

![Checkout Screen]

9. The first tab that will need to be filled in is the **Shipping** information. Click on the **edit** button besides the ship to. If you have a defaulted address it will populate, but you can change it.

![Shipping Details]

The following screen will pop up. Click on the **select from org addresses** button.

![Select From Org Addresses]
Then click on the **Search** button.

Search through the list until you find your department address and hit the select button out beside it.

The address information will drop in and you will need to click the save button.
10. The next tab to be filled in is the **Accounting Codes** Tab. To get to this section click on the **Accounting Code** Tab.

Click on the **required field** button below the **Fund**. The following will open.

Enter in your department **Fund, Organization, Account, and Program** (FOAP). Activity and **Location** will not be used except for Grants. When FOAP is entered then click the save button. Refer to BearKatBuy reference guide to setup default **Accounting Codes** for your department.

If needing to see all available **Accounting Codes** click on **Select from all values**... When Custom Field Search box opens click on search; all available will be displayed.
To split an order between multiple FOAPs, click on the edit button besides the individual line items.

This is the next screen that will appear. Click on the add split button to get the option to put in multiple FOAPs.

Under the drop down menu choose the appropriate option.

Fill in your FOAP with the correct corresponding value. Then click on the Save button.

11. Adding Internal Notes & External Notes & Attachments, see form below.
**Internal Notes and Attachments** will only stay with Requisition and not be forwarded to supplier. These documents need to be only internal SHSU documents. (Emails, written approval memos, etc.)

**External Notes and Attachments** will go from the Requisitions to the Purchase Order and sent out to the supplier when BearKatBuy sends the Purchase Order. Only attach items that the supplier would need to see such as their quote, and/or any contracts or agreements.

Whatever items are to be attached will already need to be saved to your hard drive or thumb drive as BearKatBuy will ask you to browse for your file to attach.

Click on the add attachment button, select the browse button, select the file to be attached from your drive, and click open.

If needed you can then name your file and click the **Save** button to attach the document.

12. Final step is the **Final Review** Tab. If everything is correct at this point click the **Submit Requisition** button.
Requisition will then be sent on through the approval path and if successfully submitted you will receive the following:

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Revised October 20, 2014
1. To receive on Purchase Orders you will have to find the Purchase Order that has been completed for your requisition. From your home screen go to the Orders & Documents button on the left side of the screen and do a search documents.

2. On the next screen you will have your search options. Make sure Purchase Orders is selected from the drop down list. If you know your Purchase Order number you can search for it by putting it into the middle box.

Your Purchase Order number(s) can also be retrieved by going to top right corner of BearKatBuy and right clicking on your name. When window open click on “My recently Completed Purchase Orders”.

3. On the next screen click on your Purchase Order number.
The following screen will appear:

4. At this time click on the **Receipts** tab.

The following screen will appear:
5. On the right side of the screen under the **Available Actions** drop down menu select **Create Quantity Receipt** and click the **Go** button.

This is the next screen that will appear:

6. In the top block fill in all pertinent information.
   - Packing Slip No. – document that provides list of items with a shipment, packing slip may have a packing slip number.
   - Carrier - Shipper
   - Tracking No – Number given to package when they are shipped.
   - Flexible Text Field – misc. additional information; applicable to the order.
Attach packing slip or other applicable documentation using the Attach/Link button.

7. At the bottom of the page you will input the quantity that was received. When all items have been received click on the Complete button and the final screen will appear. If multiple lines are on the order multiple lines will be provided for entry.

Final screen. Items are now ready for the invoice to be received and automatically paid if a 3 three-way match occurs between the Purchase Order, Receipt and the Invoice.
1. To receive on Purchase Orders you will have to find the **Purchase Order** that has been completed for your requisition. From your home screen go to the **Orders & Documents** button on the left side of the screen and do a search documents.

2. On the next screen you will have your search options. Make sure **Purchase Orders** is selected from the drop down list. If you know your Purchase Order number you can search for it by putting it into the middle box.

Your Purchase Order number(s) can also be retrieved by going to top right corner of BearKatBuy and right clicking on your name. When window open click on “**My recently Completed Purchase Orders**”.

3. On the next screen click on your **Purchase Order** number.
The following screen will appear:

4. At this time click on the Receipts tab.

The following screen will appear:
5. On the right side of the screen under the **Available Actions** drop down menu select **Create Cost Receipt** and click the **Go** button.

This is the next screen that will appear:

6. In the top block fill in all pertinent information.
   - Packing Slip No. – document that provides list of items with a shipment, packing slip may have a packing slip number.
   - Carrier - Shipper
   - Tracking No – Number given to package when they are shipped.
   - Flexible Text Field – misc. additional information; applicable to the order.

![Select Create Cost Receipt](image)
Attach packing slip or other applicable documentation using the Attach/Link button.

7. At the bottom of the page you will input the Cost of the items that were received. When all items have been received click on the Complete button and the final screen will appear. If multiple lines are on the order multiple lines will be provided for entry.

Final screen. Items are now ready for the invoice to be received and automatically paid if a 3 three-way match occurs between the Purchase Order, Receipt and the Invoice.
CheatSheet for Change Order Request

1. Find the Change Order Request Form button on the home screen. Click the button.

The following screen will appear:
2. Enter in the supplier information or complete a supplier search if you need to find the supplier.

![Supplier Information]

The supplier information will fill in.

3. Go down to the Change Information Section.

Provided any additional details in section provided. (All information that Purchasing need to make change)

![Change Information]

Fill in the Purchase Order Number

Select whether or not the Purchase Order is a blanket.

Select the Type of Change.

![Type of Change]

Enter in the Requested Increase Amount

Enter in Total revised amount that PO will have committed (original plus all changes)

Fill in Term Date Start and Term Date End - Period that the Order is valid.

Select Yes or No for whether or not the supplier needs a copy of PO.
4. One top right of screen under the **Available Action** drop down choose **Add and go to Cart** and click Go.

5. The following screen appears then choose the **Proceed to Checkout** button.

6. On the next screen the FOAP will need to be entered.

7. Add any **Internal or External Notes & Attachments** that need to go with the Change Order Request.
8. Final step is the Final Review Tab. If everything is correct at this point click the Submit Requisition button.

Requisition will then be sent on through the approval path and if successfully submitted you will receive the following:

Congratulations! You have successfully submitted your request. If you need to view or print a copy, click Quick View or view its status on the Approvals Tab.

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

- Requisition number: 1216756
- Requisition status: Pending
- Cart name: 2014-09-22 jeb037 03
- Requisition date: 9/22/2014
- Requisition total: 34.54 USD
- Number of line items: 1

What would you like to do next? Here are links to some common actions.
- Search for another item
- View order history
- Check the status of an order
CheatSheet for
Consolidating Carts

1. From the SciQuest home page click on the **Action Items** drop down.

2. From the Action Items Drop down click on the **Carts Assigned to Me**.
3. The following screen will pop up showing the carts that are assigned to you.

![Assigned Carts Screen]

4. To combine the assigned carts into one Cart click on the Create Cart button.

![Create Cart Button]

5. The following screen will appear.

![Cart Summary Screen]
6. Name your new cart and click on the **Update** button.

7. Go back to the Carts Assigned to Me from the Action Items drop down.

8. You will now see the new cart under My Drafts along with the **Draft Assigned to Me**.
9. Click on the first Draft Assigned To Me that you want to combine into one cart. The following screen will pop up.

[Image: Screen showing the Shopping Cart with an item selected and a check box highlighted.]

10. Make sure Items that you want dropped to the consolidated cart are selected using the check boxes on the right side of the screen.

[Image: Screen showing the Shopping Cart with a check box selected.]

11. From the drop down menu choose Move to Another Cart.
12. In the pop up screen select the cart that you want to consolidate the items to and **click on move**.

![Click Move]

13. The following pop up will appear. **Select Close** and repeat the steps 1-13 to consolidate the rest of the Draft Carts Assigned to You.

![Select Close]

14. At this time, you will need to delete the draft carts that have no items or money in them using the delete buttons on the right side of the screen.

![Select Delete]
15. You will get the following pop up where a message can be typed telling why the carts were deleted.

16. Click on the Cart Name that was created with the consolidated carts.

17. The following screen will now appear. You can Proceed to Checkout and complete the order.
CheatSheet for Approving, Disapproving & Rejecting Requisitions

Approving a Requisition

1. To approve requisitions in your approval queue click on your Action Items tab at the top right hand side of the screen.

Then click on the Unassigned Requisitions Needing Approval.

2. The following screen will pop up.
3. To go in and view the requisition that you want to approve/disapprove just click on the requisition number.

4. The detail of the requisition will pop up. Review the entire requisition to ensure everything is correct before approving.
5. To add any additional comments to the requisition before approval go to the comments tab and click on add comments.

6. The following screen will pop up to add comments. If you select the box for email notifications then an email will also be sent to the originator.
7. To add additional email recipients click on the add email recipient button (see prior screen) and the following screen will pop up to search for an additional recipient.

Click on the search button and a list of recipients will pop up. Click on the select button on the right side to select the additional recipient.

It will then drop in the additional recipient to send an email to along with the originator.

Click on the Add Comment button to add the comment and send the emails.

If you needed to attach a document to accompany your comment, find and add the document here.
8. To then approve the requisition go back to the requisitions tab. Select the drop down from your available actions. And select the Approve/complete step option.

Click on the Go button and the requisition will be forwarded on in the approval workflow process.

**Disapproving a Requisition**

1. To disapprove requisitions in your approval queue click on your Action Items tab at the top right hand side of the screen.
2. Click on the requisition number of the requisition that you want to view.

3. View the requisition.
4. Under the available actions click on Assign to myself. This will assign the requisition to you so you can make any changes and approve, send back to the originator to correct, or reject the requisition which would take the requisition out of the workflow process.

5. Now it will give you the following options from the drop down list of Available Actions. Select the Return to Requisitioner option and click on the go button.

6. The following box will pop up requiring a reason for the requisition being sent back. Click on the Return to Requisitioner and the requisition will be sent back to the requestor for them to make any changes and resubmit.
Rejecting a Requisition

1. To disapprove requisitions in your approval queue click on your Action Items tab at the top right hand side of the screen.

2. Click on the requisition number of the requisition that you want to view.
3. View the requisition.

4. Click on Assign to myself using the drop down Available Actions.
5. To reject individual line items you can scroll down to where the lines are listed. Make sure the line to be rejected is checked off on the right side and select Reject selected Items from the Available Actions drop down. Click on Go.

6. The pop up will appear asking for a reason that the line is being rejected. Put in a reason and click on Reject Line Item.
7. The rejected line item will now show up with a little red x next to it.

8. To reject the entire Requisition click on your Available Actions drop down at the top and choose Reject Requisition. Click on the Go button.

9. The pop up box will appear asking for a reason to reject the requisition. Click on the Reject Requisition button and the requisition will be rejected.
Approving from an Email

1. The requisition to be approved will generate an email that looks like the following.

   ![Requisition Email](image)

   - The requisition to be approved will generate an email that looks like the following. The requisition email will have the following details:
     - RE: Purchasing Purchase Request Approval for Requisition # 1234567
     - Date: [Date]
     - Name: [Name]
     - Email: [Email]
     - Requisition Number: [Requisition Number]
     - Total Amount: [Total Amount]
     - Details of the requisition will be included.

2. Scroll to the bottom of the email and click on the link that will drop you back into BearKat Buy site to look at the requisition to approve.

   ![Link](image)

   - The link will drop you directly into the approval screen where you will follow the steps that have already been covered in this handout.

3. The link will drop you directly into the approval screen where you will follow the steps that have already been covered in this handout.

   ![Approval Screen](image)