



Procurement: Requisitions and Receipts

Employees and Managers Making
Purchases

Procurement Benefits

No more P-Card Binders. Electronic receipts. Automated workflow and electronic approvals. 😊

Bear Trax...

- Expedites the Purchase Order process,
- Enables a more timely response from suppliers, and
- Replaces E-procurement system Bear eBuy.

The process is entirely electronic and expedited.

As always, all requisitions & expenses must follow University policy.



Terminology

- **Unit**—a department at the university
- **Unit Number**—formerly recognized as department number
- **Commitment**—a section of the budget set aside for the purchase requisition made through the Procurement module
- **Life Cycle**—the documents through the process such as a requisition, invoice, and receipts
- **Punchout Catalog**—maintained by the supplier. Punches user out of Bear Trax to the supplier's website to fill cart, then takes user back to Bear Trax to complete purchase
- **Local Catalog**—maintained within our system (e.g. Garrett Supply)



Terminology

- **Non-catalog Request**—any purchase order for an item or service not included in an existing punchout or local catalog
- **Buyer**—procurement services staff member
- **BU**—business unit
- **Procurement Card**—university procurement card housed in the procurement office used to make purchases
- **Expense card**—a card used to request non-compensation related reimbursements outside of the procurement module
- **General Ledger**—Charge Account



The Procurement Process

- Employees create requisitions and submit for approval through Bear Trax.
 - Bear Trax routes requisition to approver.
- Budget managers review and approve/reject requisition.
- Once approved, Bear Trax automatically creates a purchase order which will be reviewed by Procurement Services.
 - Bear Trax sends the requisition to the supplier based on distribution method.
- Employee receives good/service requested, then creates and submits receipt through Bear Trax.



Procurement Fast Facts

▪ Two types of cards will be used:

Procurement Card:

- In the name of SSU
- Housed in the Procurement office
- Used by approved employees for vendors that accept Pcards

Expense Card:

- In the name of the employee
- Housed with the employee

▪ Account structure is expanding from 4 to 7 fields.

- Bear Trax includes a pre-populated form to help guide you as you make purchases.



Procurement Fast Facts

The Procurement Process allows employees to make necessary purchases of goods and services for unit usage.

- Student receivables remain in Jenzabar.
 - A conversion file for student activity will be run nightly and posted to Bear Trax.
- ITS will no longer review computer purchases.
 - **Important!** Employees should still consult with ITS before making computer purchase requisitions to validate software and hardware compatibility
- Overnight travel requires purchase requisitions and formal approval.



Procurement Fast Facts

- For a requisition to become a Purchase Order, the “Suggested Buyer” field must indicate a delegated Procurement Services staff member.
- Receipts and other documentation may be attached electronically and submitted in Bear Trax.
 - Request for Payment will have a Non-PO invoice
 - Note! Send these to Procurement Services with Charge Account number on invoice via email (Procurement@Shawnee.edu)



Procurement Fast Facts

- There is no punch out catalog for Apple in Bear Trax.
- The threshold for accounting review has been increased to expenditures of \$5000 or greater (from \$2,500)
- When submitting a non-catalog request, employee must check the “Negotiated” box in the requisition
- The “Manage Approvals” button allows user to see where a requisition is at in the approval process



The End

Thank you for reviewing this business process overview!

Please contact your Department Bear Trax representative or your Manager for more information.

