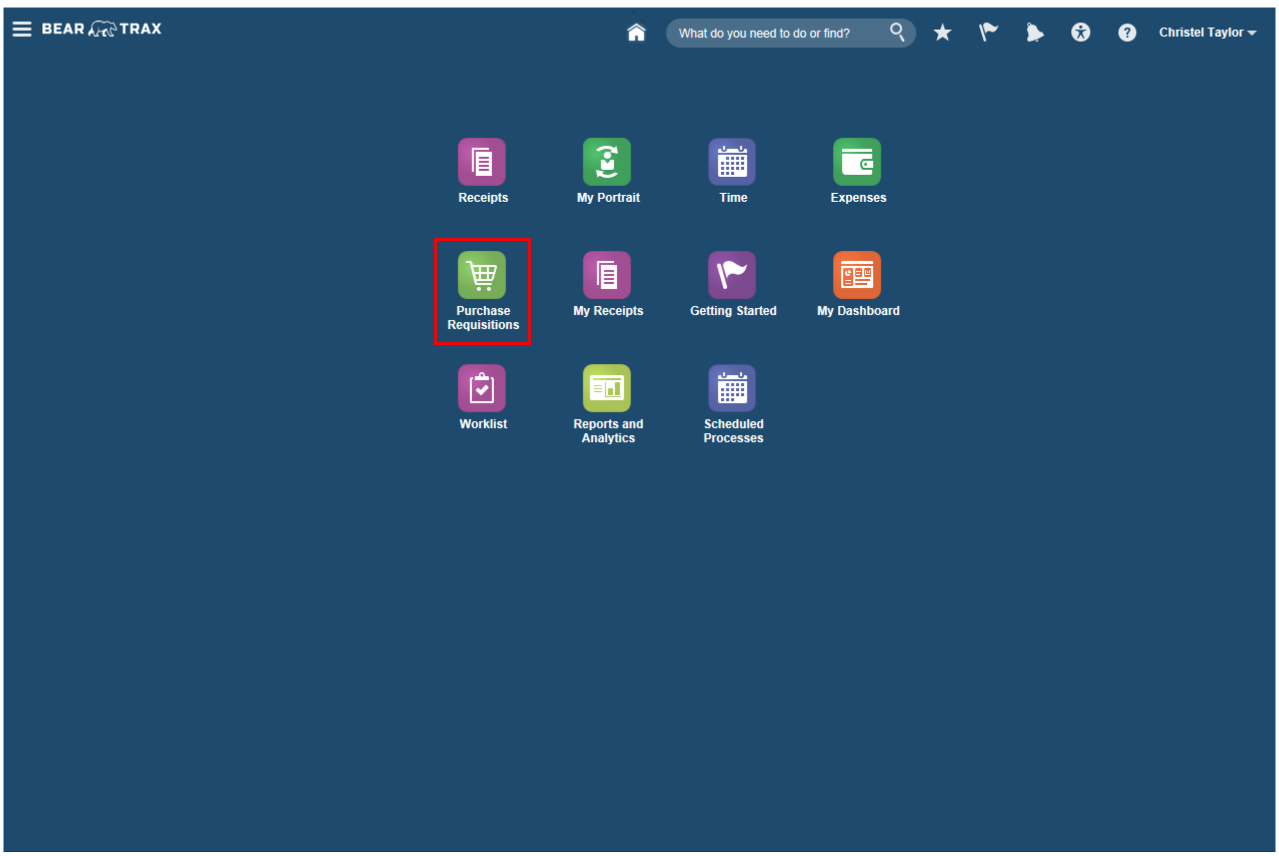
Procurement: Create a Catalog Requisition

For employees creating a catalog requisition

Purpose:	Create a catalog requisition.
How to Access:	Log into the Bear Trax application select the **Procurement** task in the Navigator.
Helpful Hints:	Be sure to keep in mind that… • This job aid is for punch-out catalog requisitions and local catalog requisitions • Quotes and other necessary information can be attached • If submitting a non-catalog requisition, refer to the Create a Requisition Non-Catalog request • Required fields are designated by asterisks, *.
Procedure:	Complete the following steps to create a catalog requisition:

1. Click on the **Purchase Requisitions** icon.



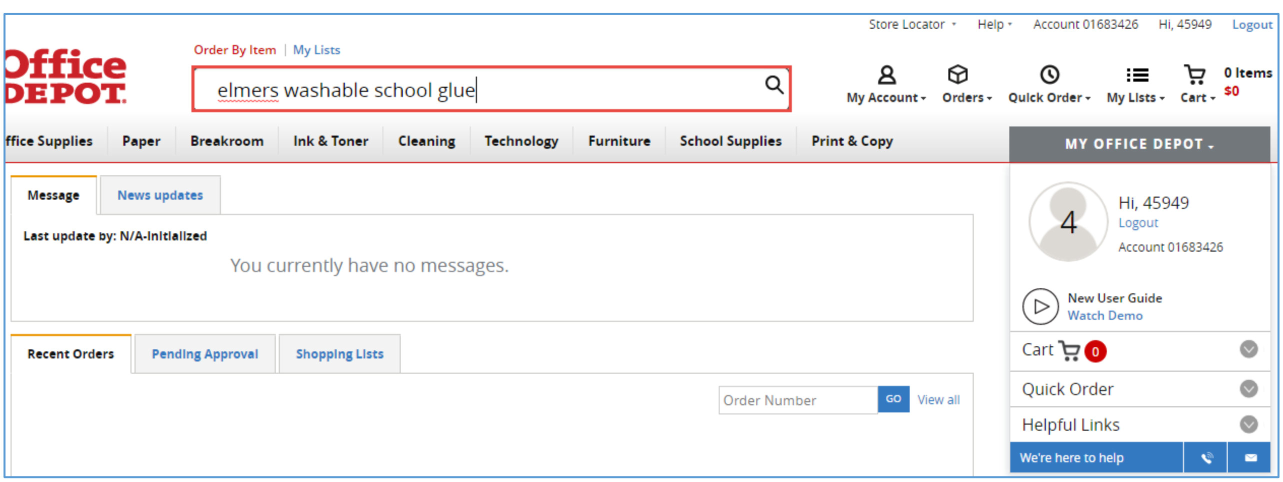
2. Select one of the catalog icons—in this example, we select **GBEX LLC.**

Note: Using the search field on the left side of the page is also an option if searching for a specific catalog item.

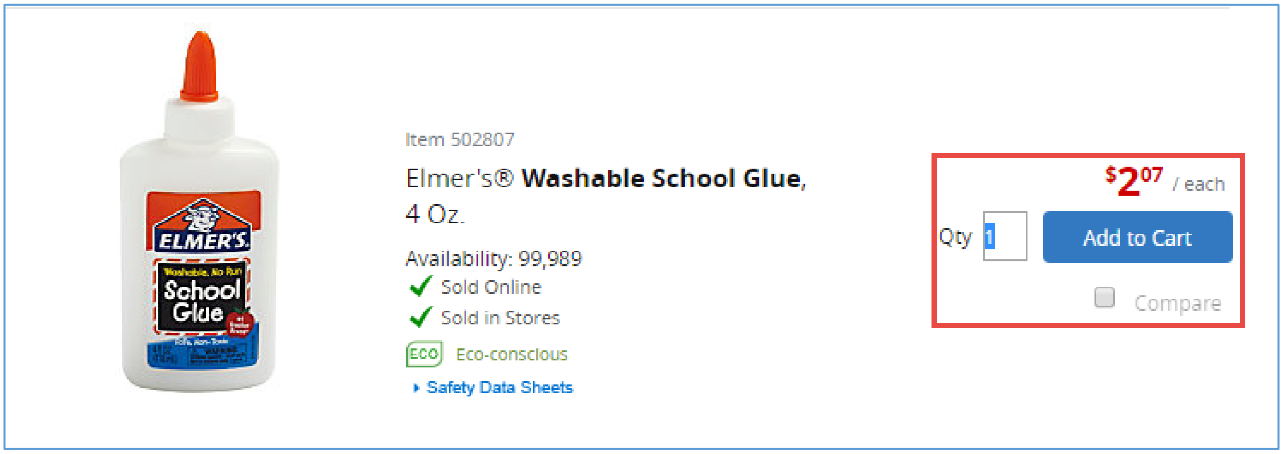
Note: Clicking one of the catalog icons will <u>punch out</u> to that supplier's website. Screenshots will not indicate the exact website clicked by users.

3. Click in the Search field and type in the item you are searching for.

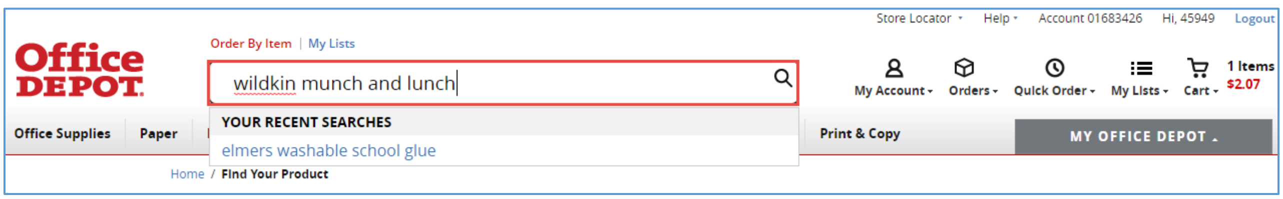
Note: There are several ways to find items to purchase. In this example, we are using the search field.



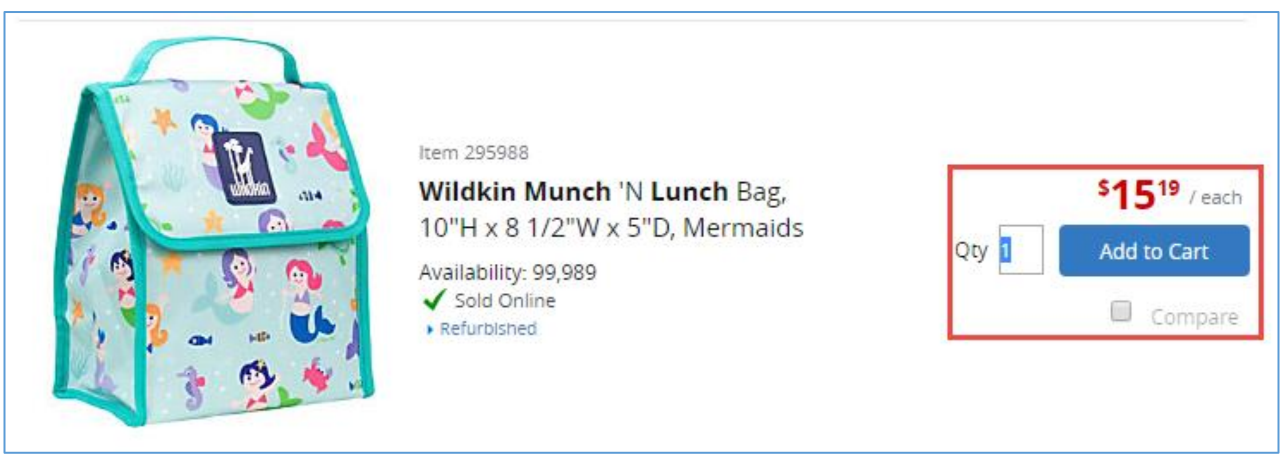
4. Click in the **Qty** box and add the quantity needed, then click **Add to Cart.**



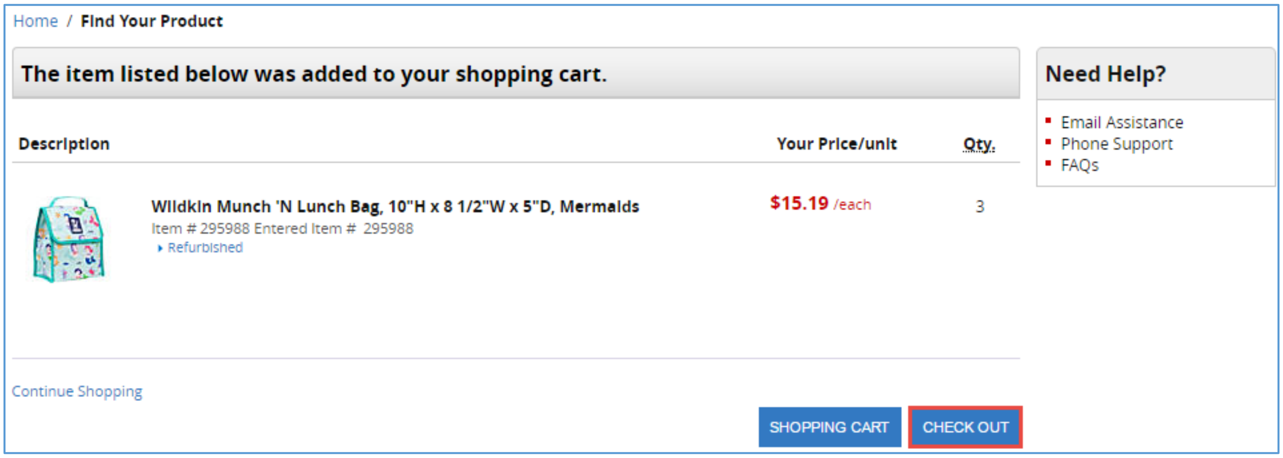
5. Click in the search field and type in the next item needed.



6. Click in the **Qty** box and add the quantity needed, then click **Add to Cart.**

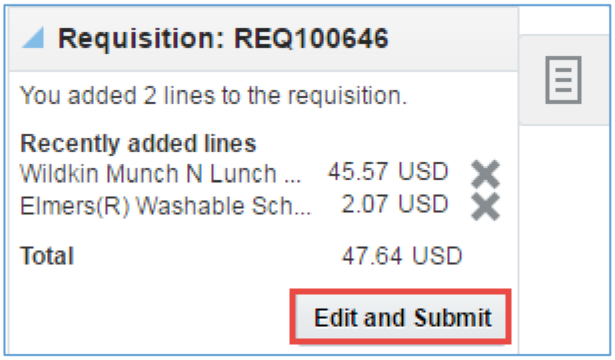


7. Click **CHECK OUT** once you have finished adding necessary items to order or reorder. This will return you to the Bear Trax application, and the requisition will appear.



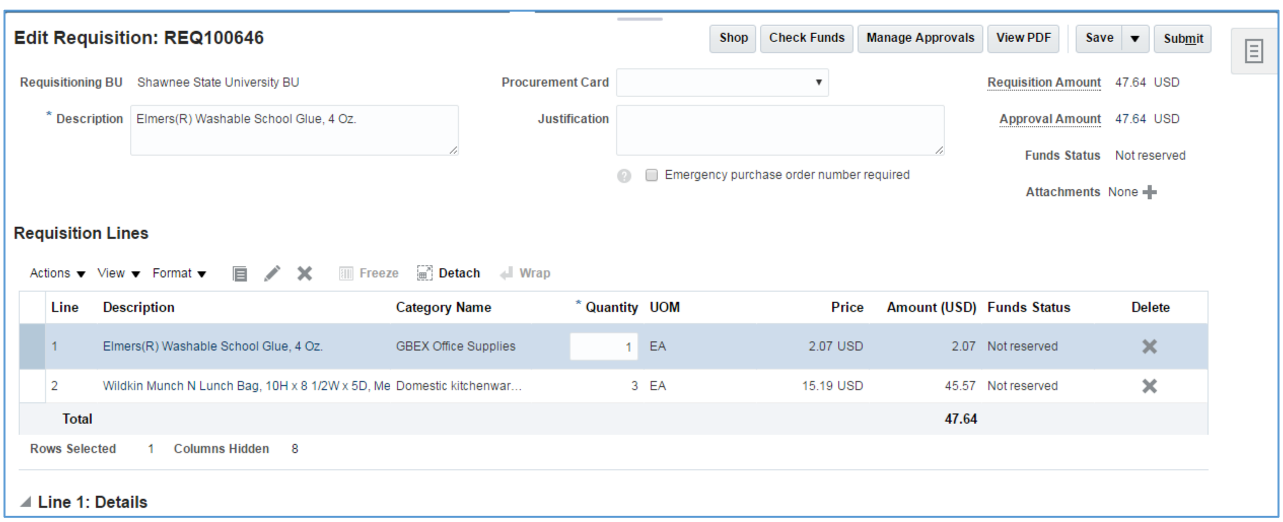
The requisition will appear under **My Requisitions** as **Incomplete**. The details of the requisition will appear in the top right corner of the page.

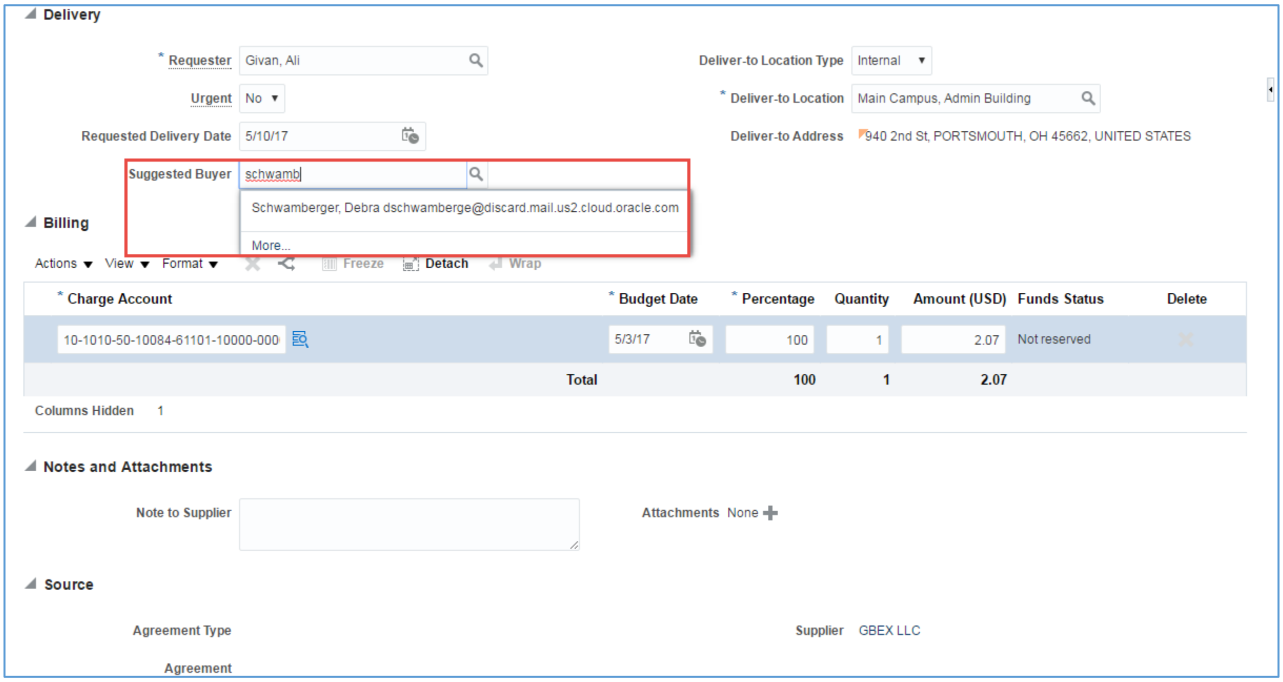
8. Click on **Edit and Submit** in order to complete the requisition.



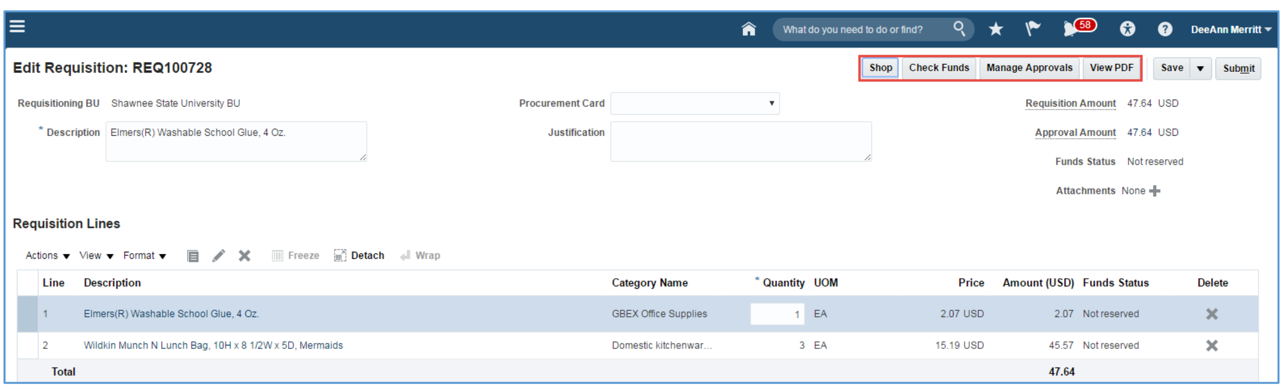
Review the details via the Edit Requisition page and add any additional details as needed. Scroll down to see additional details on the page such as Delivery, Billing and Notes/Attachments.

9. Click on the text box next to **Suggested Buyer** and enter the field with Schwamberger, Debra. The system will automatically populate the rest of that field.



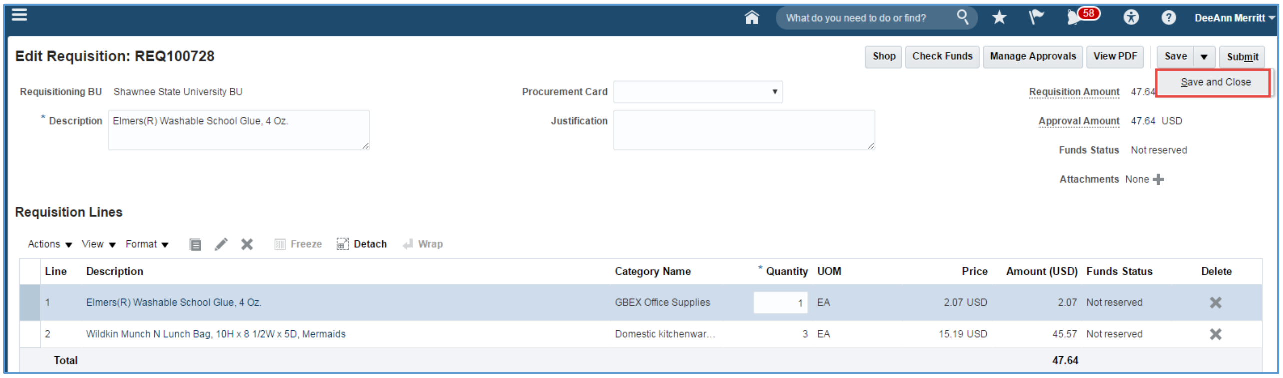


There are action buttons at the top of the page. These are OPTIONAL, and not required to complete the requisition.

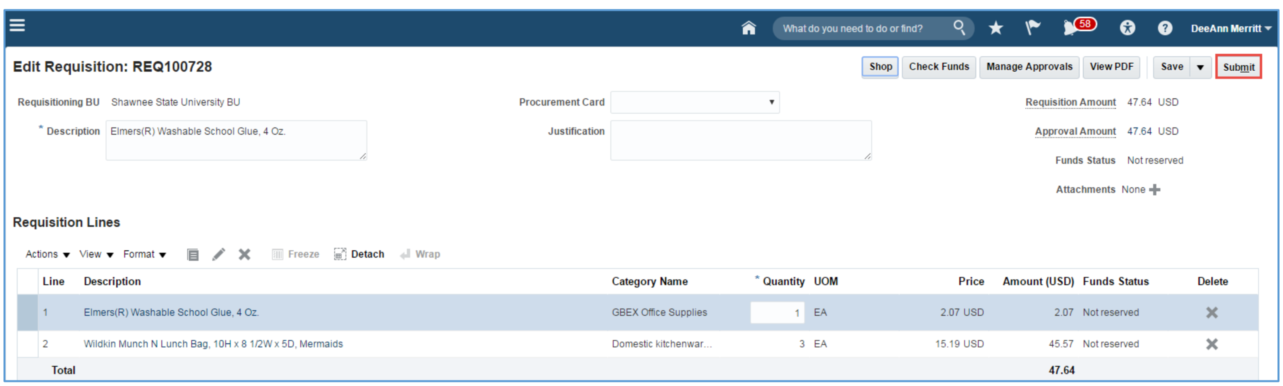


Icon	Action
Shop	Takes users back to the home page
Manage Approvals	Shows requisition status and hierarchy of the approval process
View PDF	Opens a new window with a PDF version of the requisition

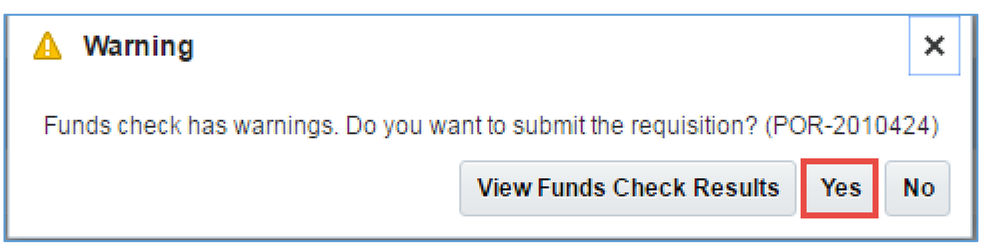
10. If you are not ready to submit, click **Save and Close** to save changes and close out of the page. The requisition will be in **Incomplete** status until it has been submitted.



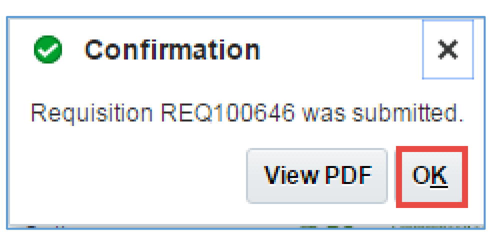
11. Click **Submit** to finalize the order and submit the requisition for approval.



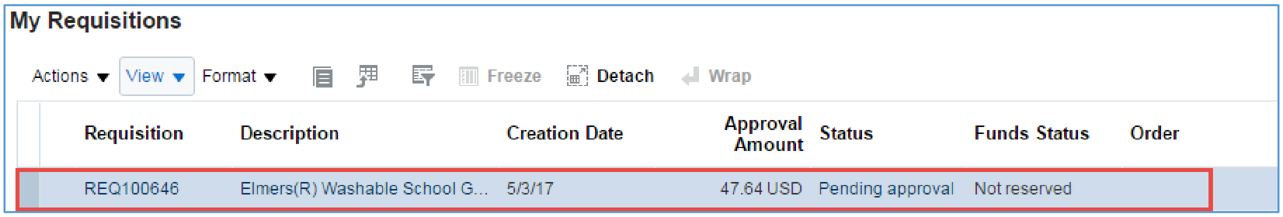
12. A warning window may appear regarding a funds check. Click **Yes** to continue and submit**.**



13. The confirmation window appears, click **OK**.



The new requisition line item now appears under **My Requisitions** and has a **Pending approval** status.



My Requisitions

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ100646	Elmers(R) Washable School G...	5/3/17	47.64 USD	Pending approval	Not reserved	

Final Notes

By following these steps, you have successfully created a catalog requisition and submitted it for approval.