

BluCard Order Job Aid

For Preparers:

1. Go to <http://ecnr.berkeley.edu>. PMB associated employees go to <http://epmb.berkeley.edu>
2. Click: "Login" located on the dark blue navigation bar; enter your CalNet ID and passphrase.
If you do not have a CalNet ID or have trouble logging in please contact: cnrit@berkeley.edu
3. At the top of this page in the dark blue navigation bar, go to: "Purchasing/Reimbursement" link.
Click on the link.
4. Two thirds down the page, go to "Queue a purchase or reimbursement request for review & approval" section.
5. At "Select name" use the pull down menu and choose the name of your faculty member or manager who has the project or funding that will benefit from the order.

BluCard orders:

6. Choose "Enter supply request" from the four available options.
7. Your PI Faculty name will pre-populate under "Unit:" Check to make sure the name is correct.
8. Choose vendor from pull down list. If vendor is unavailable, enter vendor name and phone number in comment field.
9. In "Comments" type in **bluCard order**. Add the fund number or project the item will be used towards. You may add any other important comments, such as split funding the order.
Note: If you are split funding an order, note project name or fund number supplies are benefiting and dollar amount or percentage of split in the comments section.
10. Complete for each item you order, quantity, unit of measure (UOM), catalog number, description and price. You may add additional lines using buttons.
11. When you are finished entering your items, click "Calculate totals" button.
12. You may upload any quotes or other information needed to document related request by clicking the "yes" radio button and uploading pdf documents.
13. Choose: Queue Request for Review (your blucard order is ready for approval by PI or designee)

After bluCard order has been reviewed and approved:

14. Print out a hard copy of the approved bluCard order, attach signed packing slip, and invoice and submit to CNR Purchasing Unit, 54 Mulford Hall within in 3 days of receipt of item(s).

For Approvers:

1. Follow instructions 1 through 2 at top of page to log in for approval access.
2. Below "Access purchasing & reimbursements functions for a unit for which you have ordering password" find: Faculty name
3. Faculty name (approver) should pre-populate above password box, once you set your password.
Type in password. See below for, **First Time Approver Set Up Instructions** for setting up your password.
4. "Click on Validate Password" button.
5. Select "Find requests that need review and chart strings" and click on link. This link is found beneath the box:

Enter all or part of PO number

6. Go to "Vendor" column and below click on vendor name to review that particular order or reimbursement request.
7. You will now see the entire order the preparer entered for your review and Approval.
(Preparers have been advised to include fund or project the goods/service will be used towards in the comments box).
8. Find the Chartstring box, from the pull down arrow, chose the correct chartstring for the project to pay for the goods/service.
(If the chartstring is not in the pull down list, add it at the beginning of the comments section.
Contact your assigned Research Administrator if you would like to have the chartstring added for continued future use. Chartstrings with small appropriations are not routinely added, in order to prevent fund overdrafts.
Approvers are also allowed to add/edit vendors to the right of the Vendor name.
9. Click on "Save order for unit purchase later" REMEMBER THIS IS A BluCARD ORDER so you don't want to send it to Purchasing to buy.
10. You will now be back at the page Purchasing – Search for orders & requests. Select "Find quests that need actual prices entered", located under "Find requests that need review and chart strings".
(You have the option if you want to update prices on the next screen).
11. Screen now is Purchasing- Supply request. You may update prices at this time. You need to type in the word "blucard" where indicted at the bottom right box:

PO # or blucard

12. Click the "Calculate totals" button.
13. Click on "Update order as purchased" button

First Time Approver Set Up Instructions: Approvers must be faculty or managers of funding and must log in with their CalNet ID in order to be able to set a password.

First time approvers, click on "Update ordering password" link. This link only displays for the Faculty member or managers of funding; this is a security function. Enter your new password of up to eight characters twice and select **Update password**. The system will return you to the Purchasing page where you may enter your new password and click "Validate Password".

Adding vendors and names for reimbursements:

Approvers are also allowed to add/edit vendors to the right of the Vendor name. For those needing reimbursements you may need to add their names the first time they make a reimbursement request in Our Unit. For easy of finding their name in vendor pull down use last name, then first name when adding or editing.