

Basic Supply 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.

Supply request:

6. Choose "Enter supply request" from the four available options
7. Unit: Your PI Faculty name will pre-populate. Check to make sure the name is correct.
8. Vendor: Choose the vendor from the pull down list. If vendor is unavailable, enter vendor name and phone number in comment field.
9. Comments: add the fund number or project the item(s) 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 one of the three options:
 - a. Queue Request for Review (your order is ready for approval by PI or designee)
 - b. Save request but don't queue for review (you may want to add to order later)
 - c. Return without saving request (delete request)

For Approvers:

1. Follow instructions 1 through 3 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 the password box, once you set your password.
Type in password.
See below, 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 here.

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 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 the "calculate totals" button.
10. Choose option: Send to Purchasing to buy.
CNR Purchasing staff will check the queue daily for orders that have come in. There are two other options as well that you can use, "Save order for unit purchase later (perhaps you need to speak to lab personnel) or "Save changes but don't queue for purchase". This is used if you have added to the order and still need to discuss with lab personnel before sending to Purchasing to buy.

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.

Follow step 1-3 at the top of this job aid. Then under "Access purchasing & reimbursements functions for a unit for which you have ordering 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.