

## Online Purchasing and Reimbursement requests

Find the task you want to complete in the table of contents below and follow the instructions on the associated page. Email [ourunit@lists.berkeley.edu](mailto:ourunit@lists.berkeley.edu) with suggestions for improvement.

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## Navigation for Purchasing and Reimbursement

### How to Login if you have a CalNet ID

If you have a CalNet ID, go to the news.php page for your organization e.g.  
<http://epmb.berkeley.edu/news/news.php> for Plant and Microbial Biology  
<http://ecnr.berkeley.edu/news/news.php> for ARE, NST, ESPM  
<http://resaccess.berkeley.edu/news/news.php> for RES  
<http://ourunit-ischool.berkeley.edu/news/news.php> for School of Information  
<https://www.erso.berkeley.edu/news/news.php> for College of Engineering  
<http://eneuro.berkeley.edu/news/news.php> for HWNI (non-purchasing)  
<http://bnni-intranet.berkeley.edu/news/news.php> for BNNI (non-purchasing)  
<http://csac.berkeley.edu/news/news.php> for CSAC, Chancellor’s Office, Vice Provosts, Cal Performances

<http://ls-ourunit.berkeley.edu/news/news.php> for College of Letters & Science departments  
<http://eiurd.berkeley.edu/news/news.php> for IURD  
<http://sphinx.berkeley.edu/news/news.php> for School of Public Health  
<http://opt-brs.berkeley.edu/news/news.php> for Optometry  
<http://gseou.berkeley.edu/news/news.php> for Graduate School of Education  
<http://gsppsearch.berkeley.edu/news/news.php> for Goldman School of Public Policy  
<http://eebi.berkeley.edu/news/news.php> for Energy Biosciences Institute (non-purchasing)  
<http://ourunit-ced.berkeley.edu/news/news.php> for College of Environmental Design  
<http://chem-dept.berkeley.edu/news/news.php> for College of Chemistry

and select **Login**. These links should take you to the CalNet AWS server. Enter your CalNet ID and password, and select Authenticate.

If the name in the campus directory <https://calnet.berkeley.edu/directory/> does not match your name on the intranet, please either revise your campus directory entry or get help from your HR staff to update the server.

Our Unit supports the campus single sign-on protocol. This means that if you **Login** and CalNet authenticate, do your work, **Logoff**, and then within 10 hours **Login** again to the same browser window, you will not have to re-authenticate. Please keep such an authenticated browser window secure.

## How to Login if you do not have a CalNet ID

Form the alternate URL you must use by locating the URL for your sponsoring organization in the box above and

1. Change that URL to **https**
2. Replace *news/news.php* with *noCalID.php*.

For example, for RES the URL would get changed from

<http://resaccess.berkeley.edu/news/news.php>

to

<https://resaccess.berkeley.edu/noCalID.php>

For the College of Natural Resources, (ESPM, ARE, or NST users), the non-CalNet login is

<http://ecnr.berkeley.edu/noCalID.php> since eCNR does not offer SSL for Our Unit.

On that URL enter your full name, and current password. If you wish to get taken to a change password screen after clicking **Validate Password**<sup>1</sup>, select the radio button Yes beforehand.

<sup>1</sup> Buttons get shown in **bold** in this Guide. Links get underlined.

If you do not have a CalNet ID, and the HR department gave you an alternate password, please enter your first name, middle initial without a period, last name, and password, then click Validate Password.

First name	<input type="text"/>
Middle initial (no period)	<input type="text"/>
Last name	<input type="text"/>
Password:	<input type="password"/>
I would like to change my password after I enter my current password and click Validate password: <input type="radio"/> Yes <input checked="" type="radio"/> No	
<input type="button" value="Validate Password"/>	

## How to navigate to Purchasing and Reimbursement

After **Login** or **Validate Password**, you should see more links in the navigation bar.

To begin working with Purchasing or online reimbursement requests, select the link for **Purchasing**.

## How to exit

When you're done with your work e.g. queuing a request, please click **Logoff**. CalNet users may keep working in the same browser window so that if they need to return within 10 hours, they do not have to re-authenticate after clicking **Login**.

## *Unit head – how to prepare for online Purchasing*

If you are a unit head or delegate e.g. a principal investigator or lab manager, go to the **Our Unit** link in the blue nav bar. Then click [View or edit information about this unit](#)

## To verify your unit's ordering information

After selecting the link above, make sure your unit's physical address and phone number read correctly so that the Purchasing team will know where to see packages delivered, and the unit directory will correctly list your unit location. If you have an RUA, enter it. If you wish to identify someone who may review your financial reports and update your faculty page, enter that person's name as the delegate on this page. You may have only one delegate, but may change it whenever you prefer. Then, click **Save information**.

In the example below, Ruxin Liu has been entered as the delegate.

Unit phone:	Country code	1	Area code*	510	Local phone*	642	-9999	Extension	0
Street address	111 Koshland Hall								
Street address									
City*	Berkeley								
State	CA - CALIFORNIA								
Country*	United States								
Postal code	94720								
Optionally, enter name of delegate below:									
First name	Ruxin								
Initial									
Last name	Liu								
If your unit has a Radiation Use Authorization enter the RUA number below:									
RUA									
Save information									

## To assign nicknames to chartstrings used for Purchasing

From the **Our Unit** page, click [View or edit nicknames for chartstrings for this unit](#) below your Unit name.

You should see a list of the chartstrings set up for your use. If you want to use a chartstring not yet on the list, ask your Accounting group to add it for you.

By default, this page only shows chartstrings for awards that have not yet passed their end date, or that do not have an end date. You may click a link just above the list of chartstrings, to view the chartstrings set up for your use on this system.

You may enter a nickname of up to 50 characters for each chartstring. Please use only A-z, 0-9 as characters in the nicknames. When done, click **Save nickname information**.

In the example below, chartstring 94021-13619-4--ME1SJ was given nickname 'Novartis-Plant'.

Funding agency	Syngenta International AG		
Project	Agricultural Genomics		
Chartstring:	94021-13619-44--ME1SJ	Status:	Active
		Nickname:	Novartis-Plant

The nicknames you set up will display just before the chartstring for purchasing or reimbursement requests, as seen next to the Chartstring: label in the purchasing example below.

Chartstring:	Novartis-Plant-94021-13619-44--ME1SJ
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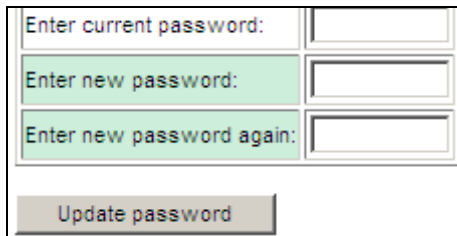
## To set up the ordering password for your unit

The unit head must follow the directions about How to navigate to Purchasing and Reimbursement above. Your accounting organization will also need to have set up the Unit and Updated by Nancy Schimmelman – July 31, 2009

awards information for the unit first.

On the Purchasing page, look just below the heading  
**Access purchasing & reimbursement functions for a unit for which you have ordering password**

The unit head should click the Update ordering password link. This link only displays for the unit head. When first setting up your ordering password, leave the current password field empty. Enter your new password of up to eight characters twice and select **Update password**.



The screenshot shows a web form for updating a password. It consists of three input fields stacked vertically, each with a label to its left: 'Enter current password:', 'Enter new password:', and 'Enter new password again:'. The 'Enter new password:' field is highlighted in green. Below these fields is a button labeled 'Update password'.

The system will return you to the Purchasing page where you may enter your new password and click validate Password. Read the section **Purchasing and Reimbursement for unit heads and delegates** below for information about features available to the unit head or a person to whom the unit head chooses to give purchasing approval authority by sharing the ordering password.

### ***How to enter a Purchasing or Reimbursement request – non-unit head***

Before you may enter requests for supplies or reimbursement, either

1. Staff must have loaded information about you into the intranet and entered an appointment with a chartstring that ends in a flexfield assigned to a unit head supported on your server.
2. Or, if you do not have a payroll chartstring ending in the unit head's flexfield, the *unit head* may create an unpaid association between you and the unit by following the directions given on the Purchasing page in [View instructions for adding a new person allowed to do purchasing](#)

To enter a request, sign into the intranet as described at the beginning of this Guide. Select **Purchasing Reimbursement** on the navigation bar. This should bring you to a page similar to the one below, but with your unit head's names in the pulldown:

## Purchasing & Reimbursement

View [instructions](#) for adding a new person allowed to do purchasing.

View [instructions](#) for requesting reimbursement.

### Access purchasing & reimbursement functions for a unit for which you have ordering password

Pick the name of the head of the unit below, enter its ordering password, and select Validate Password.

Hendrix, Donna	▼
Password:	<input type="password"/>
Validate Password	

### Queue a purchase or reimbursement request for review & approval

Pick the name of the head of that unit below, and select Enter supply request, or request Supply, Entertainment, or Travel reimbursement.

Hendrix, Donna	▼
Enter supply request	Request reimbursement for supply purchase
Request reimbursement for entertainment expense	Request reimbursement for travel expense

[See the status of your recent requests](#) [Locate your requests not yet queued for review or approved](#)

[See the status of requests made by your unit in the last 90 days](#)

[See items and catalog numbers ordered by your unit\(s\)](#) - available before 8 am or after 8 pm due to potentially large report

[User Guide for Purchasing and Reimbursement - 285kb PDF](#)

Under the heading **Queue a purchase or reimbursement request for review & approval** select the name of the unit head that you would like to pay for the request. Click the appropriate button:

- **Enter supply request**
- **Request reimbursement for supply purchase**
- **Request reimbursement for entertainment expense**
- **Request reimbursement for travel expense.**

If you're requesting reimbursement for expenses from an organization head or Department chartstring, select the name of the administrative head of that organization

## How to enter a Supply request

For a supply request, the system should display something similar to: (with your selected Unit name, phone, address and unit head name pre-filled in the approval section instead). Please read and follow the directions on the page.

## Purchasing - Supply request

For a purchase request, please fill out the page, click Calculate totals, and click **Queue Request for Review**.

If you are not ready to have your request reviewed, but do have **at least one item line entered**, you may Save it and return to it later via the [Locate your requests not yet queued for review or approved](#) link on the Purchasing page.

If you need to include a quote or configuration with your request after you Queue or Save it, click the radio button Yes. After you click Save or Queue, you should then see a page that summarizes the request, and lets you browse and upload PDFs (ONLY PDFs).

Do not use commas in item prices, as this will truncate the price after the comma.

Unit:	Hendrix, Donna	Phone:	(510)642-4080	Address:	111 Koshland Hall		
Vendor:	Not yet selected						
Comments:							
Qty	UOM	Catalog#	Description (max 50 char.)	Est. Unit Price	Total	Tax?	Delete line?
1	EA			0.00	0.00	Y	N
1	EA			0.00	0.00	Y	N
1	EA			0.00	0.00	Y	N
Add another line		Add 5 lines		Show line numbers	Calculate totals	Cancel Order	

I would like to upload material related to this request after Saving or Queuing it:  Yes  No

If you do not see the vendor in the list, put the vendor name in the Comments section.

Enter for each item of your request:

- quantity (Qty)
- unit of measure (UOM)
- catalog number (Catalog#) if known
- an item description
- the estimated price for one such item (Est. Unit Price), without a \$ sign. Avoid entering commas in the price field as this will truncate the price after the comma.

You must supply either a catalog number or a description, or both, for each item.

Select the **Calculate totals** button to see how much the request adds up to with tax. You may use the Tax? pulldown for an item to change its tax status, which will get shown after you select **Calculate totals** again.

If you need to remove a line, select the Delete line? pulldown, change it to Y, and select **Calculate totals**. You do not have to remove unused lines, as the system will ignore them when you click **Queue Request for Review**.

The **Add another line** button will estimate your totals, and add a new line.

The **Cancel Order** button will tag the request as cancelled in the database.

Clicking the **Show line numbers** button will display a small line number to the left of each line. Clicking **Hide line numbers** removes them from the page.

#	Qty	UOM	Catalog#	Description (max 50 char.)	Est. Unit Price
1	1	EA			0.00

When you have entered the desired lines, click **Queue Request for Review**. The system will review your request for errors. If it finds none, it will save the request. If it finds errors, it will list error messages to give you a chance to fix them. Please make sure you click **Queue Request for Review** after making changes, as your request does not get saved otherwise.

If you want to save your request so you may return to it and make more changes, you may click **Save request but don't Queue for review**. You will need to use the link on the Purchasing page, [Locate your requests not yet queued for review or approved](#) to see a list of requests you may view to edit or Cancel.

In either case, if you need to upload a PDF documenting your request, you may check Yes next to I would like to upload material related to this request after Saving or Queuing it:

You should next see a page that lets you select and upload one or more PDFs. Please use only a-z, 0-9 in your filenames, and keep them short – less than 25 characters.

Please use filenames for your uploads that indicate content e.g. ENT004444.pdf. Please avoid embedded spaces or special characters.

Upload order-related PDF from file location:

Once you have queued your request, anyone in your unit with the ordering password may use it and click [Find requests that need review and chartstrings](#), and add the chartstring to approve the request for you.

## How to enter a Supply purchase reimbursement request

To get reimbursed for supplies you bought, you should click **Request reimbursement for supply purchase** on the Purchasing page. You should then see a page similar to the example below, with the unit name you selected instead, and its phone, address and unit head name pre-filled. Please read and follow the directions on the page.

If you do not see the name of the person to get reimbursed in the Reimburse: pulldown, put the person's name in the Comments section. If present in the pulldown, select the name of the person to reimburse.

## Purchasing - Supply reimbursement request

1. Fill out the page, selecting the person to get Reimbursed. If the person is not yet listed in the Reimburse pulldown, leave that as Not yet selected and put the name of the person in the Comments area.
2. Click Calculate totals.
3. Fix any errors, then click Calculate totals again
4. Print the page.
5. **Select Queue Request for Review.** Or, if you are not ready to have your request reviewed, but do have **at least one item line entered**, you may Save it and return to it later via the Locate your requests not yet queued for review or approved link on the Purchasing page.  
Do not use commas in item prices, as this will truncate the price after the comma.
6. Tape your receipts to one side of a **blank** page.  
If you want to include a PDF receipt with your request click the radio button Yes. After you click Queue or Save, you should then see a page that summarizes the request, and lets you browse and upload PDFs (ONLY PDFs).
7. Sign the printed page, and bring it to your unit head or authorized delegate.
8. Ask that person to review and approve your request, and obtain unit head signature.
9. Take the signed page to Accounting, along with any non-uploaded receipts.

Unit:	Hendrix, Donna	Phone:	(510)642-4080	Address:	111 Koshland Hall		
Reimburse:	Not yet selected						
Comments:	<div style="border: 1px solid black; height: 40px;"></div>						
Qty	UOM	Catalog#	Description (max 50 char.)	Unit Price	Total	Tax?	Delete line?
1	EA			0.00	0.00	Y	N
1	EA			0.00	0.00	Y	N
1	EA			0.00	0.00	Y	N

I would like to upload material related to this request after Saving or Queuing it:  Yes  No

Enter for each item of the request:

- quantity (Qty)
- unit of measure (UOM)
- catalog number (Catalog#) if known
- an item description
- the actual price paid for one such item (Unit Price), without a \$ sign or commas.

You must supply either a catalog number or a description, or both, for each item.

Click the **Calculate totals** button to see how much the request adds up to with tax. You may use the Tax? pull down for an item to change its tax status, which will get shown after you select **Calculate totals** again.

If you need to remove a line, select the Delete line? pull down, change it to Y, and click **Calculate totals**. You do not have to remove unused lines (a line without catalog number, description, and estimated price), as the system will ignore them when you click **Queue Request**

## for Review.

The **Add another line** button will estimate your totals, and add a new line.

The **Cancel** button will tag the request as cancelled in the database.

Clicking the **Show line numbers** button will display a small line number to the left of each line. Clicking **Hide line numbers** removes them from the page.

# Qty	UOM	Catalog#	Description (max 50 char.)	Est. Unit Price
1 1	EA			0.00

When you have entered the desired lines, select **Queue Request for Review**. The system will review your request for errors. If it finds none, it will save the request. If it finds errors, it will list error messages to give you a chance to fix them. Please make sure you click **Queue Request for Review** or **Save** after making changes, as your request does not get saved otherwise.

If you want to save your request so you may return to it and make more changes, you may click **Save request but don't Queue for review**. You will need to use the link on the Purchasing page, [Locate your requests not yet queued for review or approved](#) to see a list of requests you may view to edit or Cancel.

In either case, if you need to upload a PDF documenting your request, you may check Yes next to I would like to upload material related to this request after Saving or Queuing it:

You should next see a page that lets you select and upload one or more PDFs. Please use only a-z, 0-9 in your filenames, and keep them short – less than 25 characters.

Please use filenames for your uploads that indicate content e.g. ENT004444.pdf. Please avoid embedded spaces or special characters.

Upload order-related PDF from file location:

Once you have queued your request, anyone in your unit with the ordering password may use it and click [Find requests that need review and chartstrings](#), and add the chartstring to approve the request for you.

## How to request Entertainment and Travel reimbursement

On the Purchasing page, select the name of the unit head you would like to pay for the request, and click the appropriate button, either:

**Request reimbursement for entertainment expense** or  
**Request reimbursement for travel expense.**

If you have no guest list, and need to pay a bill directly to a hotel or restaurant instead of to a traveler or host, click **Request reimbursement for supply expense** instead.

The Purchasing Unit selection page contains a link that summarizes the most current instructions for these, and those pages also contain the most current instructions.

Please fix any errors for which you receive messages, because **errors keep your request from getting saved.**

A unit head may make these reimbursement requests and assign a chartstring in one step, once logged in with the ordering password. If you are a unit head or have the ordering password for a unit head, please read directions for these tasks in the section below called “Purchasing and Reimbursement for unit heads and delegates”.

If you’re not a unit head and do not have the ordering password, follow see the examples below.

## **Entering an Entertainment reimbursement request**

**PLEASE read and follow the directions on the online form page.**

Enter the date of the event in format yyyy-mm-dd. Enter name of the Host of the event. Select as the Vendor the name to reimburse. Select the kind of event, and enter its location. Briefly describe the event and its purpose. Enter the Guest list. If appropriate, select from the pulldowns that identify special circumstances.

Enter one line per expense, and the unit price without \$ or commas in the price. If an expense had sales tax, change the Tax? pulldown to Y and click **Calculate totals.**

You may remove a line by selecting the pulldown Y under the corresponding Delete line? and clicking **Calculate totals.** The **Add another line** button will estimate your totals, and add a new line. The **Cancel request** button will tag the request as cancelled in the database.

When you have entered the desired lines, and clicked **Calculate totals** with no resulting errors, select **Queue Request for Review.** The system will again review your request for errors. If it finds none, it will save the request. If it finds errors, it will list error messages to give you a chance to fix them. Please make sure you click **Queue Request for Review** or **Save** after making changes, as your request does not get saved otherwise.

If you want to save your request so you may return to it and make more changes, you may click **Save request but don’t Queue for review.** You will need to use the link on the Purchasing page, [Locate your requests not yet queued for review or approved](#) to see a list of requests you may view to edit or Cancel.

In either case, if you need to upload a PDF documenting your request, you may check Yes next to I would like to upload material related to this request after Saving or Queuing it:

You should next see a page that lets you select and upload one or more PDFs. Please use only a-z, 0-9 in your filenames, and keep them short – less than 25 characters.

Please use filenames for your uploads that indicate content e.g. ENT004444.pdf. Please avoid embedded spaces or special characters.

Upload order-related PDF from file location:

Once you have queued your request, anyone in your unit with the ordering password may use it and click [Find requests that need review and chartstrings](#), and add the chartstring to approve the request for you.

Note example form below.

Unit:	Hendrix, Donna	Phone:	(510)642-4080	Address:	111 Koshland Hall
Date Event	yyyy-mm-dd	Host:			
Reimburse:	Not yet selected				
Description - max 150 chars.				Kind of event:	Administrative Meeting
Purpose - max 150 chars.				Location of event:	
Comments:				Special circumstances?	N
				Alcohol in expenses?	N
Guests - max 255 chars.				Spouses as guests?	N
				Holiday party/staff picnic?	N

Qty	UOM	Description (max 50 char.)	Unit Price	Line Total	Add tax?	Delete line?
1	EA	e.g. breakfast cost/person - \$26 max	0.00	0.00	N	N
1	EA	e.g. lunch cost/person - \$38 max	0.00	0.00	N	N
1	EA	e.g. dinner cost/person - \$64 max	0.00	0.00	N	N
1	EA	e.g. light refreshments cost/person - \$17 max	0.00	0.00	N	N
1	EA	e.g. room rental	0.00	0.00	N	N
1	EA	e.g. per ticket charge	0.00	0.00	N	N

I would like to upload material related to this request after Saving or Queuing it:  Yes  No

**Entering a Travel reimbursement request**

**PLEASE read and follow the directions on the online form page.**

Enter your home city, and select the dates and times of departure and return. Select the name of the person to Reimburse. Briefly describe the trip and its purpose. Enter the trip starting location and destination. If appropriate, select from the pulldowns that identify certain situations e.g. car license plate if used.

Enter one line per expense, and the unit price without \$ or commas in the price. If an expense had sales tax, change the Add tax? pulldown to Y and click **Calculate totals**..

You may remove a line by selecting the pulldown Y under the corresponding Delete line? and clicking **Calculate totals**. The **Add another line** button will estimate your totals, and add a new line. The **Add 5 lines** button will estimate your totals, and add five new lines . The **Cancel request** button will tag the request as cancelled in the database.

When you have entered the desired lines, and clicked **Calculate totals** with no resulting errors, select **Queue Request for Review**. The system will again review your request for errors. If it finds none, it will save the request. If it finds errors, it will list error messages to give you a chance to fix them. Please make sure you click **Queue Request for Review** or **Save** after making changes, as your request does not get saved otherwise.

If you want to save your request so you may return to it and make more changes, you may click **Save request but don't Queue for review**. You will need to use the link on the Purchasing page, [Locate your requests not yet queued for review or approved](#) to see a list of requests you may view to edit or Cancel.

In either case, if you need to upload a PDF documenting your request, you may check Yes next to I would like to upload material related to this request after Saving or Queuing it:

You should next see a page that lets you select and upload one or more PDFs. Please use only a-z, 0-9 in your filenames, and keep them short – less than 25 characters.

Please use filenames for your uploads that indicate content e.g. ENT004444.pdf. Please avoid embedded spaces or special characters.

Upload order-related PDF from file location:

Once you have queued your request, anyone in your unit with the ordering password may use it and click [Find requests that need review and chartstrings](#), and add the chartstring to approve the request for you.

Unit:	Hendrix	Unit phone:	(510)642-4080	City of residence:	enter your home city
When departed home/office:		Date, time returned: yyyy-mm-dd		Employee?	N
2009-07-6 7 AM		2009-07-6 6 PM		UC Student?	N
Reimburse:	Not yet selected				
Description - max 150 chars.	Trip starting location:				
Purpose - max 150 chars.	Trip destination:				
Comments:	If car used, had liability insurance?		Y	Car license plate:	
	US Citizen?		Y		

Qty	UOM	Description (max 50 char.)	Unit Cost	Line Total	Add tax?	Delete line?
1	EA		0.00	0.00	N	N
1	EA		0.00	0.00	N	N
1	EA		0.00	0.00	N	N

I would like to upload material related to this request after Saving or Queuing it:  Yes  No

## To see the status of requests

On the Purchasing entry page, you have the option to view information about your own and your unit's requests.

## To view your own requests

Select the link [See the status of your recent requests.](#)

The system should show you a list of requests you made, except for merged requests. If a supply request got ordered, or a reimbursement request was approved, you should see the PO or ENT or TRV number and date. If your request has been received and the packing slip or expense receipts uploaded, you should see the date received.

However, if your request got merged with other requests for supplies from the same vendor, you will have to check with the person who approved the merged request for status.

To view details about who did what with your request, click the link View request on the appropriate line.

Total	Date Requested	PO Number	Date Ordered	Vendor	Date Received	Item	Item Status	View request
1.00	2008-09-18		2008-09-18		2008-09-18	test	Received	<a href="#">View request</a>
2.00	2008-09-18		2008-09-18		2008-09-18	test1	Received	<a href="#">View request</a>
3.00	2008-09-17					test2	Requested	<a href="#">View request</a>

If you need to cancel a request, ask someone with the ordering password to do this for you. Since that person or a staff member could be in the middle of trying to fulfill your request, the system does not let you cancel a request yourself.

## Your incomplete requests and cancelling a request

To locate requests that you Saved, but did not Queue for review, or that you have queued but the have not yet been approved, click [Locate your requests not yet queued for review or approved](#)

Purchasing & Reimbursement - my incomplete or not yet approved requests			
The list below shows requests you started but have not yet Queued for review, or that have been queued for review but not yet assigned a chartstring.			
Total	Type	Vendor	Edit request
1.10	Purchase Order	Nova Biochem	<a href="#">Edit request</a>
2.19	Purchase Order	Not yet selected	<a href="#">Edit request</a>

If you click Edit request, you may view or Cancel your request. Once it has been approved and a chartstring assigned, the paying manger must Cancel it if needed. If it's been sent to Purchasing, you will need to have staff Cancel a request if needed.

## Your unit's recent requests

Or, you may click [See the status of requests made by your unit in the last 90 days](#) that will display a similar list (without the View request links) of requests made by anyone affiliated with a unit with which you're associated. Someone paid by multiple units will see requests from each of the units.

## All your unit's requests

Between 8 pm and 8 am, you may click [See items and catalog numbers ordered by your unit\(s\)](#) to get a listing of all the items and their catalog numbers. Copying and pasting this list into a spreadsheet may let you do analysis about amounts paid for particular items over time.

## ***Purchasing and Reimbursement for unit heads and delegates***

On the Purchasing page, locate the heading **Access purchasing & reimbursement functions for a unit for which you have ordering password**

Select the name of the unit head. Enter the ordering password for that unit head. Click **Validate Password**.

A person who serves as a delegate for more than one unit will see the names of each funding unit head known to the system from which to choose.

### Access purchasing & reimbursement functions for a unit for which you have ordering password

Pick the name of the head of the unit below, enter its ordering password, and select Validate Password.

[Update ordering password](#)   [Forget your ordering password? Re-set it.](#)

Schimmelman, Nancy R. ▼
Password: <input type="password"/>
<input type="button" value="Validate Password"/>

The system will display the “Search for orders & requests” page, which lets you select links as shown below, or take a quick look at your recent requests by date or by vendor, or go to another page to select criteria for a custom search of your order history (advanced search criteria). You may also export your Unit data as SQL inserts after normal business hours, or view the User Guide.

### Purchasing - Search for orders & requests

Please check both links below regularly for requests needing action.

[Find requests that need review and chartstrings](#)

[Find requests that need actual prices entered](#)

If you expect funds from your own unit to pay for the request, use one of the four links below. Otherwise, click on Purchasing and select the name of the person you expect to fund the request from the lower pulldown before clicking on the button for the type of request on that page.

[Enter supply request](#)

[Request reimbursement for supply purchase](#)

[Request reimbursement for entertainment expense](#)

[Request reimbursement for travel expense](#)

[Use advanced search criteria](#)

[Export unit ordering data as SQL files](#)

[See the status of requests made by your unit in the last 90 days](#)

[See items and catalog numbers ordered by your unit\(s\)](#) - available before 8 am or after 8 pm due to potentially large report

[User Guide for Purchasing and Reimbursement - 247kb PDF](#)

### To search for orders

1. To get a quick summary of your recent order activity, pick one of the buttons for List orders and requests. Some sort by the date the order got entered, the other, by the vendor. Requests may display as ‘Not yet assigned’ for vendor. You may view, but not update orders except

for item tags using these links.

2. If you select [Find requests that need review and chartstrings](#) the system will either give you a message that you have no requests in that state, or display a list of request for you to select and work with as noted below.
3. If you select [Find requests that need actual prices entered](#), the system will either give you a message that you have no requests in that state, or display a list of request for you to select and work with as noted below. Use this link if you or someone in your unit has purchased items instead of routing the supply request(s) to Purchasing to buy for you.
4. On the Advanced Search page, pick your criteria, and click ‘Search for orders’ e.g.:

Order(s) for:	Hendrix, Donna K		
Order status:	<input type="radio"/> Requests <input checked="" type="radio"/> To Place <input type="radio"/> Sent Purch. <input type="radio"/> Ordered <input type="radio"/> Received <input type="radio"/> Cancelled		
PO number	<input type="text"/>	Vendor Reference number	<input type="text"/>
Requested by:	Anyone <input type="text"/>		
Ordered by:	Anyone <input type="text"/>		
Vendors:	Any vendor used by unit <input type="text"/>		
Fund:	Any fund <input type="text"/>		
Database contains POs you entered starting M-YYYY 9-2004 Please pick After and Before months with at least one month between them.			
Ordered after:	2004 <input type="text"/>	Month January = 1	1 <input type="text"/>
but before:	2008 <input type="text"/>	Month	10 <input type="text"/>
Item description contains:	<input type="text"/>	Comment contains:	<input type="text"/>
Item status:	Any status <input type="text"/>		
Tag(s) on items:	<input type="text"/> ignore tags <input type="text"/> Computer Equipment <\$5000		
<input type="button" value="Search for Orders"/>			

Specify a valid date range e.g. Ordered after April, 2008 but before June, 2008. Make sure you specify at least one month in the search criteria range before selecting Search for Orders. You may specify other search criteria, although using many criteria will slow the search somewhat.

Order status criteria:

Requests – a purchase or reimbursement request filled out, e.g. PI or Unit member identifies some item(s) needed and enters a request, with an estimated price. These requests need an authorized person to review, assign chartstring(s), and either queue for Unit ordering via BluCard or personal VISA or cash purchase, or send to the Department for ordering.

To Place – requests waiting for a Unit BluCard holder to purchase, or supply reimbursements awaiting actual price entry by the Unit.

Sent Purch.– requests queued for the Purchasing team to buy.

Ordered – a request that has been ordered from a vendor or purchased by a Unit member

for reimbursement, with actual prices, optional vendor reference number, and if ordered by Department, a UC PO, ENT, or TRV number.

Received – an order that has had its packing slip or receipts uploaded by the Department.

Cancelled – and order that the Unit cancelled. You may only cancel an order before it has been placed with a vendor. Accounting may Cancel an order at Receive time, but will have to call the vendor to arrange return of the items.

***Please make sure to return all packing slips to Purchasing*** so the slips may get scanned and uploaded as links to your orders.

For non-accounting people, only vendors already used by your unit will display in the vendor choice pull down. Only funds already used by your unit display in the fund choice pull down. You may search with the “Any...” option selected also.

You may enter part of a word or phrase for the “Item description contains” or “Comment contains” criteria. You do not need a wild card character to do so.

## To split charges between chartstrings

Select the link for ‘Enter new order or request for supply reimbursement’, to get a page similar to the pages shown earlier, but with the chance to select one chartstring from the pulldown or click Split % to request cost sharing between two or more chartstrings:

Chartstring:	None selected from this list	%: 100	Split %
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Enter you request as discussed above, but select the vendor, Adding a new vendor if needed, and assign chartstring(s).

Clicking Split % should display a page similar to the partial example below. PLEASE read and follow the page directions about formatting input fields.

Fund	Org*	Program*	Project	Flexfield*	Percent*	Remove?
19900	13600	40		MEADM	100	N
					Total:	100
Add input line - new chartstring		Add input lines - 5 new chartstrings				
Save chartstring split						

When you click ‘**Add input line – new chartstring**’ (or ‘**-5 new chartstrings**’) you should see another set of fields into which you may place the values for another chartstring. Please ensure the percents you enter total 100 before clicking **Save chartstring split**. Lines left blank get ignored when you click Save. You should get returned to your request after Saving.

If you enter a chartstring that does not belong to you, after saving your splits and returning to the Request page, please email to your Accounting group or (if available) use the Browse and

Upload functions depicted below to upload a PDF of an email or other document that authorizes your use of this chartstring.

Please use filenames for your uploads that indicate content e.g. ENT004444.pdf. Please **avoid** embedded spaces or special characters.

Upload order-related PDF from file location:

You may get a warning message telling you that the chartstring you wish to use needs to get added to the database by Accounting before you may use it.

### To make a supply request

On the “Search for orders & requests” page visible after Validating the ordering password, click Enter supply request. This should take you to a page similar to the example shown below.

Unit:	Archer, Heather S	Phone:	(510)642-4080	Address:	111 Koshland Hall			
Requested:	Schimmelman, Nancy R	<a href="#">Edit a vendor</a>						
Vendor:	Not yet selected	<a href="#">Add new vendor</a>						
Chartstring:	None selected from this list			%: 100	Split %			
Comments:								
Shipping:	0.00	Handling (taxed):	0.00	Hazard Fee:	0.00			
ETA:	0000-00-00	Tax rate:	0.0875					
Qty	UOM	Catalog#	Description (max 50 char.)	Est. Unit Price	Total	Tax?	Delete line?	Item Status
1	EA			0.00	0.00	Y	N	Requested
1	EA			0.00	0.00	Y	N	Requested
1	EA			0.00	0.00	Y	N	Requested
<input type="button" value="Add another line"/>		<input type="button" value="Add 5 lines"/>		<input type="button" value="Show line numbers"/>		<input type="button" value="Calculate totals"/>		<input type="button" value="Cancel Order"/>
<input type="button" value="Return without saving or changing order"/>								
I would like to upload material related to this request after Saving or Sending it: <input type="radio"/> Yes <input checked="" type="radio"/> No								
<input type="button" value="Send to Purchasing to buy"/>			<input type="button" value="Save order for unit purchase later"/>					
<input type="button" value="Save changes but don't queue for purchase"/>								

Use the pull downs to select the person requesting the order or reimbursement, the vendor, and the chartstring.

If you don't find the vendor you prefer, you may add a new vendor using the **Add new vendor** link. Please review the list of vendors carefully first before adding a new one, as the vendor list comes from BFS and we should try hard to match its vendor names. Please enter people's names as first name last name as vendors for reimbursement.

The organization's Purchasing team will adhere to campus purchasing guidelines, but will try to use the requested vendor if most appropriate. Please locate the vendor's phone number before attempting to add it, as the system requires this field.

If you do not see the name of the person to get reimbursed in the Reimburse: pulldown, put the person's name in the Comments section. If present in the pulldown, select the name of the person to reimburse.

Enter for each item of the request:

- quantity (Qty)
- unit of measure (UOM)
- catalog number (Catalog#) if known
- an item description
- the actual price paid for one such item (Unit Price), without a \$ sign or commas.

You must supply either a catalog number or a description, or both, for each item.

Click the **Calculate totals** button to see how much the request adds up to with tax. You may use the Tax? pull down for an item to change its tax status, which will get shown after you select **Calculate totals** again.

If you need to remove a line, select the Delete line? pull down, change it to Y, and click **Calculate totals**. You do not have to remove unused lines (a line without catalog number, description, and estimated price), as the system will ignore them when you click **Queue Request for Review**.

The **Add another line** button will estimate your totals, and add a new line.

The **Cancel** button will tag the request as cancelled in the database.

Clicking the **Show line numbers** button will display a small line number to the left of each line. Clicking **Hide line numbers** removes them from the page.

#	Qty	UOM	Catalog#	Description (max 50 char.)	Est. Unit Price
1	1	EA			0.00

The Return without saving or changing order button will tag the request as cancelled in the database if you had not previously saved it.

When you have entered the desired lines, you may either:

- Click the **Save order for unit purchase later** button if you intend to purchase this request yourself using a blucard, your own credit card online, or another agency. After completing the purchase, you will need to use the link [Find requests that need actual prices entered](#) to view the request and enter what you finally paid for each item.
- Click the **Send to Purchasing to buy** button if you want the Purchasing team to place the order with the vendor for you.

- Click the **Save changes but don't queue for purchase** button if you want to save what you've entered so far but not move the order to the order placing stage.

You must pick a chartstring and a vendor. If you need the Purchasing team to select the vendor, pick a reasonable one and remark in the comments that you wish staff to select the actual vendor.

You may check Yes if you would like to upload a PDF that contains a quote or configuration for this purchase request after Saving/Sending the request. Or, this link appears if you calculate totals or visit the Split % page.

## To upload a quote or other material related to your order

1. Before you Save, or Send a request, you may check the radio button to indicate you'd like to upload next. The upload link also appears if you click **Calculate totals**.

I would like to upload material related to this request after Approve/Save/Sending it:  Yes  No

Save order for unit purchase later    Approve estimated reimbursement expenses

Send to Purchasing to buy

If you check Yes, you will see a view of your order after Saving or Sending it. You will be able to **Browse** and **Upload a PDF** then.

2. Or, after assigning a chartstring to a request, you may use one of the buttons to see orders from a recent period (e.g. 30 or 90 days), or use advanced search to see orders to Place or Sent to Purch.
3. When you view such an order, you should see an area where you may browse for PDFs to upload, the Upload PDF. The system only supports PDFs! It will not replace a file with the same name with another version of the file, so use a different file name if you need to upload a later version.

## To make a supply reimbursement request

PLEASE read and follow the directions on the form page.

For a request to get reimbursed for supplies you or someone else purchased, the system should display something similar to what's shown below: (with the selected Unit name, phone, address and unit head name pre-filled in the approval section instead).

If you do not see the name of the person to get reimbursed in the vendor list, use the Add vendor function after carefully checking for the name last-name, first-name and first-name last-name in the last.

Enter for each item of the request:

- quantity (Qty)

- unit of measure (UOM)
- catalog number (Catalog#) if known
- an item description
- the actual price paid for one such item (Unit Price), without a \$ sign or commas.

You must supply either a catalog number or a description, or both, for each item.

Select the **Calculate totals** button to see how much the request adds up to with tax. You may use the Tax? pulldown for an item to change its tax status, which will get shown after you select Calculate totals again.

If you need to remove a line, select the Delete line? pull down, change it to Y, and select **Calculate totals**. You do not have to remove unused lines, as the system will ignore them when you click **Queue Request for Review**. The **Add another line** button will estimate your totals, and add a new line. The **Add 5 lines** button will estimate your totals, and add five new lines. The **Cancel** button will tag the request as cancelled in the database. Clicking the **Show line numbers** button will display a small line number to the left of each line. Clicking **Hide line numbers** removes them from the page.

#	Qty	UOM	Catalog#	Description (max 50 char.)	Est. Unit Price
1	1	EA			0.00

Please select a chartstring, or select one and then use the **Split %** button to specify multiple chartstrings to use.

When you have entered the desired items, select **Approve Reimbursement expenses**. The system will review your request for errors. If it finds none, it will save the request. If it finds errors, it will list error messages to give you a chance to fix them. Please make sure you click **Approve Reimbursement expenses** after making changes, as your request does not get saved otherwise.

Unit:	Archer, Heather S	Phone:	(510)642-4080	Address:	111 Koshland Hall		
Requested by:	Schimmelman, Nancy R	<a href="#">Edit a vendor</a>					
Vendor:	Not yet selected	<a href="#">Add new vendor</a>					
Chartstring:	None selected from this list				%: 100 Split %		
Comments:	<div style="border: 1px solid gray; height: 40px;"></div>						
Shipping:	0.00	Handling (taxed):	0.00	Hazard Fee:	0.00		
ETA:	0000-00-00	Tax rate:	0.0875				
Qty	UOM	Catalog#	Description (max 50 char.)	Unit Price	Total	Tax?	Delete line?
1	EA			0.00	0.00	Y	N
1	EA			0.00	0.00	Y	N
1	EA			0.00	0.00	Y	N
<a href="#">Add another line</a>		<a href="#">Add 5 lines</a>		<a href="#">Show line numbers</a>		<a href="#">Calculate totals</a> <a href="#">Cancel</a>	
I would like to upload material related to this request after Approve/Save/Sending it: <input type="radio"/> Yes <input checked="" type="radio"/> No							
<a href="#">Approve reimbursement expenses</a>				<a href="#">Save changes but don't queue for reimbursement</a>			
<a href="#">Return without saving or changing request</a>							

## To prepare an entertainment or travel reimbursement request

PLEASE read and follow the request form page instructions, or review them online from the Purchasing page via: View [instructions](#) for requesting reimbursement.

Read the sections “Entering an Entertainment reimbursement request” or “Entering a Travel reimbursement request” above as appropriate. Someone with an ordering password may also select a chartstring, or **Split %** between chartstrings.

Once you’ve been able to click Calculate total without seeing error messages, you may  
**Approve reimbursement expenses** – to queue this request for Accounting to receive  
**Save but don’t send for reimbursement yet** – to keep the request in your queue  
**Return without saving** - to keep the request in your queue  
**Cancel request** – to flag the request as Cancelled in the database.

## To find requests that need review and chartstrings

1. From the Purchasing page, select [Find requests that need review and chartstrings](#).
2. Click on a request from the list. Review it, and if appropriate, assign a chartstring and if needed, a Vendor or person to Reimburse. Then you may select:
  - **Send to Purchasing to buy** (for supply requests)
  - **Approve reimbursement expenses**
  - **Save order for unit purchase later** (e.g. blucard purchase)
  - **Save changes but don’t queue for purchase** (for supply requests)
  - **Save changes but don’t queue for reimbursement**

- If you have multiple supply requests for the same vendor, you may click ‘Review and possibly merge orders for same vendor’. This should display a page that gives you the option of checking which requests to merge, as seen with test data below:

The list below shows the requests eligible for merger. Please check those requests you would like merged into **one order per vendor** with yourself as the person making the request. Then, click Merged checked orders.

You will have a chance to adjust quantities etc. when assigning a chartstring to the merged order.

Check to merge	Vendor	Requested	Who requested	Quantity	Item	Est. unit price	Tot. line price
<input type="checkbox"/>	HACH COMPANY	2006-01-17	Schimmelman	1	more stuff	2.00	2.17
<input type="checkbox"/>	HACH COMPANY	2006-01-23	Schimmelman	1	items - 3rd order	1.00	1.09
				1	more items - 3rd	2.00	2.17
<input type="checkbox"/>	HACH COMPANY	2005-07-12	Schimmelman	1	sendback	10.00	10.88

If you check at least two requests for the same vendor, and click **Merge Checked Orders**, you will get returned to the list of requests awaiting chartstrings. The merged order will contain the items from the checked orders, and you as the requestor. You may adjust quantities etc as usual when assigning a chartstring.

If you’d like to merge orders from different vendors, change the vendor on each order to the desired vendor, update item descriptions/catalog numbers, then follow the merge process above.

## To complete orders to place in the Unit

- From the Purchasing page, select [Find requests that need actual prices entered](#).
- If the system finds one or more orders to display for you in a list, select one by clicking on the vendor name link e.g. Hawaiian Research in the example below.

Click on the Vendor name for an order below to view it.  
**If you just changed an order, your changes did take effect, but will not display if you click on the order in the unrefreshed list below. Go to Search Orders and do a new search to see the updated order.**

Vendor	Date Requested	PO Number	Date Ordered	Vendor	Date Received	Total	For
<a href="#">HAWAIIAN RESEARCH</a>	2004-10-01					5.44	Jenkins

- Once you’ve found an order ready to place, call or order online as usual with the requested vendor. Enter a non-zero Actual price for each item or expense with no \$ or commas in the price. If known, enter the vendor reference number in the yellow highlighted cells. You may leave the PO# or blucard field blank, but we encourage putting ‘blucard’ in this field if that’s what you used for the purchase. This makes it easy to do later searches for blucard purchases. You will see the BFS vendor ID if it’s been entered for the selected vendor.

Shipping:	0.00	Handling (taxed):	0.00	Hazard Fee:	0.00	ETA:	0000-00-00	Tax rate:	0.0975
Qty	UOM	Catalog#	Description (max 50 char.)	Est. Unit Price	Actual Unit Price	Total	Tax?	Delete line?	Item Status
1	EA		glop	15.00	15.00	16.46	Y	N	Requested
						Order total:	16.46		
Link tags to items		Show line numbers		Calculate totals		Cancel Order			
Vendor reference number:				BFS vendor ID	0000558354	PO # or blucard			
Update order as purchased		Save changes, but NOT change order status				Update, Clone			

If you do not want to place the order yet, select **Return without saving** or changing order.

When you have entered the actual price and vendor reference number, select **Update order as purchased**. The system will save the date you placed the order, and change the item(s) status to Ordered.

If you have made some changes but are not yet done placing the order, click **Save changes but not change order status**.

You may create a new order with the items from this order in it, ready to edit, by clicking on the **Update, Clone** button.

## To tag an item or items in an order

You may tag supply items when viewing an order after a search by selecting the **Link tags to items** button. This will display a screen similar to the one below:

For each item in this order, you may select one or more tags to associate with each item. On a PC, hold the Ctrl key down to select or de-select multiple items. On a Classic Macintosh, use the Shift key for this purpose. On OS X, expect erratic results, as the Shift key seems to select a range instead of select/deselect when two choices get selected.

Please pick tags carefully. The system does not check whether the tags you pick make sense e.g. it will allow you to select both Computer Equipment < \$5000 and Computer Equipment >= \$5000.

**To save your links:**

1. select Link items & tags on this page AND
2. **select Save or Send Order when returned to the order display page.**

Item description	Tags associated with this item
test item	<ul style="list-style-type: none"> <li>No tags.</li> <li>Another new tag</li> <li>Computer Equipment &lt;\$5000</li> </ul>

Link items & tags

[Add a new tag for your Lab to use](#)  
[Select one of your Lab tags to Edit](#)  
[Go back to order without changing links](#)

The tags shown in the list consist of the standard campus accounting classifications, and any additional custom tags someone in your Unit has defined.

Selecting the link [Add a new tag for your Unit to use](#) should display a screen that lets you enter the text for a new tag:

Select **Save tag** once entered.

If instead you pick Select one of your Unit tags to Edit, pick the tag from the pull down on a page such as shown below, and select the button **Edit selected tag**:

Pick a tag to Edit, or choose the link to Add a new tag.

you should see that same tag entry/edit page, but with the tag shown for saving or deleting.

#### Search for orders

If you change the text for a tag, you do not affect the links between the tag and items you had set up. Items linked to the old tag now link to the updated tag.

You may remove a tag and your links to it from this page by using the **Delete tag and its links to items** button. Please use Delete carefully, as this operation does not have an Undo or confirmation step.

## To authorize people not paid by your unit to use online Purchasing

People you pay on chartstrings associated with your flexfield will get listed as possible requestors, and may make requests. However, if you'd like to authorize someone e.g. a rotation student, volunteer, graduate student paid by department, postdoc on fellowship etc., the unit head/PI may click on the People & Courses link in the blue navigation bar.

Then, click the link in:

Follow this [link](#) to see people associated with your unit not paid on your flexfield e.g. graduate students paid by a Department, postdocs with independent fellowships, volunteers. Or, you may make new associations.

If you already set up such associations, you'll see them on the next page. To add a new association, click [Add a new unpaid association](#)

You should see a page similar to the one below. Using the People Finder box in the upper right corner, enter the last and first names of the person you want to add, and click UC People Finder.

First name as in People Finder*	First Name
Initial*	
Last name as in People Finder*	Last Name
Name as in payroll	
Display name, last name first	
Display name, first name first	
Full Email	
Department	PMB - Plant & Microbial Biology
Division	A.S. - Academic Senate
UID*	0

This person has the following associations with your unit. Please set Requestor for Purchasing to Y if you want to see the name of the person in the pulldown list of Requestors.

Type of Association*	Start Date YYYY-MM-DD	End Date YYYY-MM-DD	Comments (150 char. stored)	Requestor for Purchasing?	Delete Association?
Graduate Student - paid by Department	2008-07-18	0000-00-00		Y	N

Save information above      Add another association

If the person has a CalNet ID, you should see the entry for that person. Copy the uid number. Note the highlighted uid in the upper right corner of the example below.

<b>Details for: SCHIMMELMAN, Nancy</b>			uid: <b>210939</b>
NAME	TITLE	EMAIL	
SCHIMMELMAN, Nancy	IT Manager	nancys@nature.berkeley.edu	
ADDRESS 1		PHONE (c)	

Go Back to return to the entry page, and paste in the uid for that person. Enter the person's names exactly as in the People Finder. The People Finder often combines a first name and middle name or initial s the "first name".

Form the "Payroll name" by entering the last name, comma, no space, first name, and middle initial with no period e.g. Schimmelman,Nancy R

Form the display name, last name first by entering the last name, comma, a space, first name(s) or nickname(s) as the person wants to see his or her name when names are being displayed with the last name first e.g. Schimmelman, Nancy R.

Form the display name, first name first by entering the first name(s) or nickname(s) then last name(s) as the person wants to see his or her name when names are being displayed with the first name first e.g, Nancy R. Schimmelman.

Select your own department, division, type of association, and period, and **click Save information above**. You are giving the person a sort of honorary membership in your own unit for purchasing purposes.

If the person cannot get a CalNet ID, ask HR to put the person into the database for you, and then set up the unpaid association.