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A. BearBuy Navigation

Overview

- The left side panel contains important news and information.
- Icons are active slide-out menus when selected or hovered over.
- Menu options are grouped by related tasks.

<table>
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<tr>
<th>Home Shop</th>
<th>1. UC BearBuy Logo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shop Menu</td>
<td>2. User Information</td>
</tr>
<tr>
<td>Order &amp; Documents</td>
<td>3. Bookmarks</td>
</tr>
<tr>
<td>Catalogs and Contracts</td>
<td>4. Action Items</td>
</tr>
<tr>
<td>Accounts Payable</td>
<td>5. Notifications</td>
</tr>
<tr>
<td>Supplier Management</td>
<td>6. Cart Preview</td>
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<tr>
<td>7. &quot;Shop at the Top&quot;</td>
<td>15. BearBuy News</td>
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<td>8. Home Shop</td>
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<tr>
<td>9. Shop Menu</td>
<td>17. Campus Related Services</td>
</tr>
<tr>
<td>10. Order &amp; Documents</td>
<td>18. Collapsible Catalog Categories</td>
</tr>
<tr>
<td>11. Catalogs and Contracts</td>
<td></td>
</tr>
</tbody>
</table>
Managing My Approvals List

*Top Banner*

**Action Items**

- All transactions pending your review and approval will be listed in the *Actions Items* banner drop down.
- You cannot delete items on the *Action Items* banner. The action item will automatically be removed when you’ve performed the action needed.
- Clicking on item listed within *Action Item* takes you directly to the area where action is needed. You will see your approvals list with a *Not Assigned* filter pre-selected.

![Action Items](image)

**Notifications Tab in the Banner at the top of the page**

- Individual *notifications* will be listed.
- *Notifications* are based on the preferences you’ve set under *Personal Notifications*.
- You can delete *notifications* from the screen by clicking on *x* next to each notification message.
- New notifications highlighted in Banner.
- Clicking on the notification takes you directly to the transaction in question.

![Notifications](image)
B. BearBuy Approvals (Worklist)

**Accessing Approvals List**
- All tasks related to approvals are located in the Approvals sub-menu.

Note: If you will be out of the office and need to assign a substitute approver for a certain period of time, please submit a Help Desk ticket stating:
- The name of the individual who will be out,
- The name of the individual who will serve as the substitute,
- What the desired substitution dates/times are.

**List vs Folder View**
When you click on My Approvals, you can then view Group Results By: List or Folder.

**View by List**
- Transactions will not be separated out by specific folders
- You can assign a transaction from this screen without having to open up the document (clicking on the transaction number).

**View by Folder**

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1 Help Desk email address is: bearbuyhelp@berkeley.edu
Managing My Approvals List

- When no work is pending review/approval for a specific folder, the folder will **not** be listed.
- You can assign a transaction from this screen without having to open up the document (clicking on the transaction number).
- You’ll see **one folder** per role and specific org node you’ve been assigned,
  - My PR Approvals will be the first folder listed when you have orders assigned to you.

### Filtering
- Regardless of which view (**List** or **Folder**) you’re in, you will always have the same **filtering** options.
- The number next to any **filter** option annotates the number of transactions that meet that filter criteria.
- Selecting the **view all** icon expands the specific filter and you are able to view all the options available.

**Note:** **Every time you navigate away from the Approval pages, your filters will reset. This includes logging in and out of BearBuy.**

*Filtering for unassigned work* is done by locating the **State Filter**. There are 3 possible options you may see under the State filter.
- **Not Assigned:** Transaction is available to be worked on.
- **Assigned:** Transaction is currently being reviewed by another user. Not available to be worked on by anyone else.
- **Hold:** Transaction has been placed on hold pending further actions.

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2 Recommended view for your Approvals list is by Folder when working in a department where there is a large group of users holding the same role.
Filtering for specific Org Nodes is done by locating the Custom Field section in the left navigation bar.

- The Custom Fields filter also includes filtering by specific Fund, Account, Chartfield 1 or Chartfield 2 code, and much more.

- If you have more than 1 Org Node you wish to filter your Approval list by, you’ll have to enter each Org Node manually by selecting Add another Org Node.

### My Recent Approvals (Outbox)

- When you click on My Recent Approvals, you can view the transactions you have approved.

- You can filter your recent Approvals by:
  - Date
  - The action you took (approved vs rejected)
C. Document Search

The purpose of this section is to create a search for requisitions at Current Workflow Step pending approval for a specific Org Node.

Accessing Document Search

- All tasks related to Document Search are located in the Document Search sub-menu.
- You can click on the sub-tabs to:
  - Search Documents: Navigate to the document search page
  - View Saved Searches
  - Download Export Files: Access the searches you’ve selected to export

Advanced Document Search

- To select an advanced Document Search (where you can set search criteria) simply select advanced search below the search bar.
  - After selecting Requisitions for the search type, you’ll be able to see a large list of additional filtering criteria.
To view a list of transactions that are pending review and approval from Document Search simply select the following criteria:

- Select **Current Workflow Step** (if you are a Requisition Creator, select PR Creator, etc)

![Workflow Step Selection](image)

- After selecting a **Current Workflow Step** from the pop-up window, select **add**.

![Current Workflow Step Selection](image)

- Add your custom filed filter (By org node, fund, etc). You can add more than one specific custom field (Org Node, Fund Code, Account Code, etc) by selecting **Add another [Custom Filed Name]**. Once entered, click **Go**.

![Custom Filed Selection](image)
The search will return all transactions that meet the criteria.
You can select the transaction number and can assign, review and approve the transaction from here.

Note: You will not be able to tell if the transaction that comes up in your results has been assigned to someone else. You will have to open up each transaction individually to see the assign status.

Saving your search
You can save your search to be able to locate any current transactions that meet the criteria you set at
You will first have to set your search filter criteria and then from the search results page, select Save Search.
Managing My Approvals List

- Enter a name for your Search and select the appropriate Personal Folder and hit save.
  1. If you currently don’t have a Personal Folder, select the New icon to add one.

- You can add a short cut to your saved search. This allows you to view your saved search on the simple document search page.

- Another option is to bookmark your Saved Searches page.
You can **rename** your bookmark.

1. Navigating to **bookmark menu** and clicking **Edit**.
2. Click the **pencil** to edit the name of a bookmark.
3. **Enter** the **new name** for the bookmark.
4. Click the **checkmark to save** the name of the bookmark.
5. Select **Done**.

There is the option to **restore** default bookmark names by clicking the **circular arrows** next to each renamed bookmark.

To **delete** a bookmark, select the **trash can**.

**NOTE:** The Organization Message system bookmark name cannot be renamed.