BearBuy

User Reference Guide –

Managing My Approvals:

My Approvals vs Document Search

Version 2

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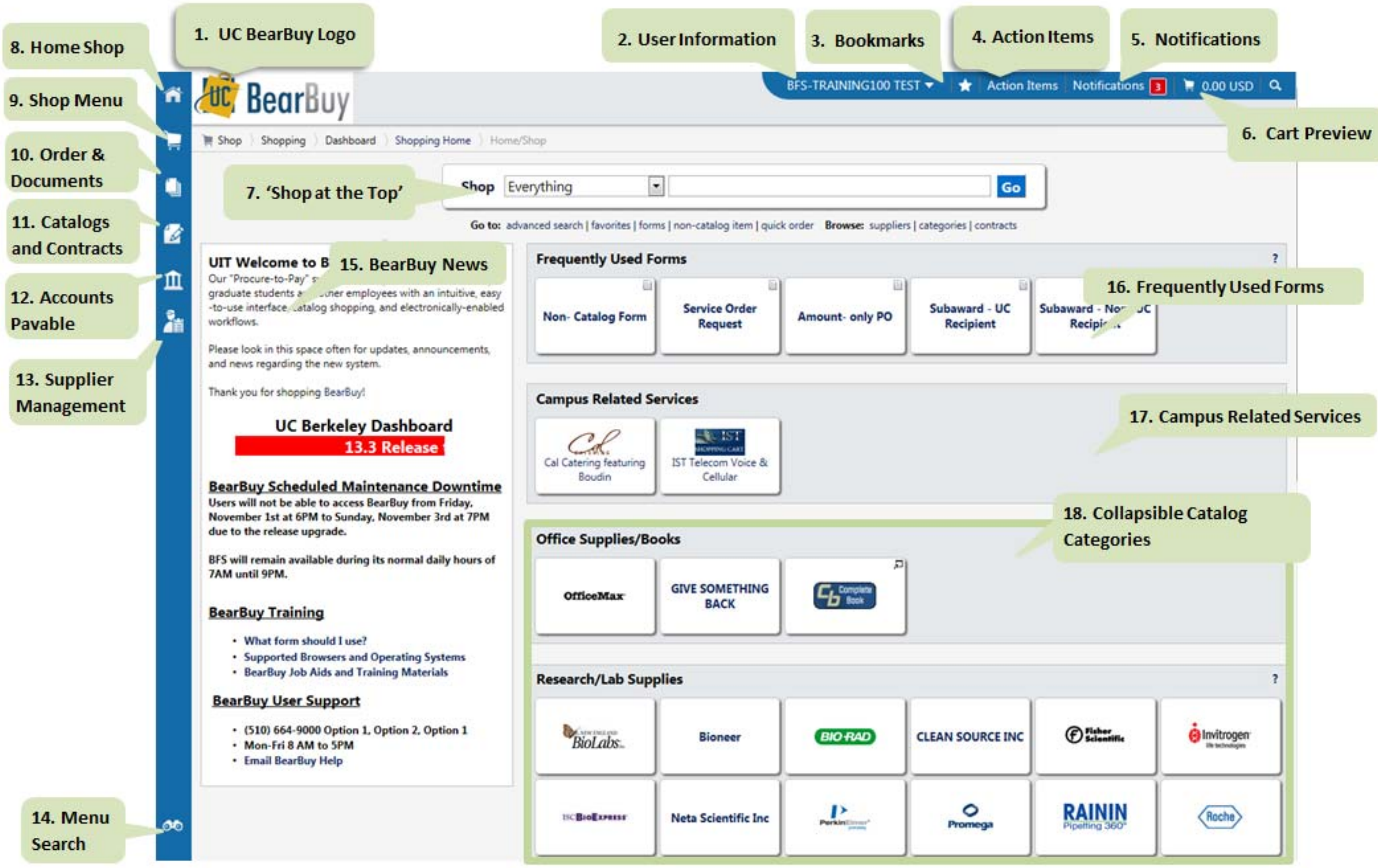
A. BearBuy Navigation

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.

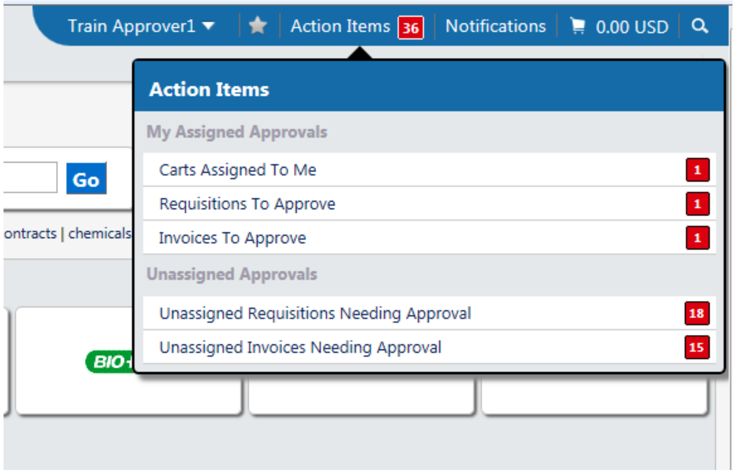


	Home: Click on the icon to return to the BearBuy Home/Shop page.
	Shop: Shopping menu and tasks including shopping page, forms, carts and orders.
	Orders and Documents: Menu for Document Search and My Approvals sub-menu.
	Catalogs and Contracts: Menu for Contract Management, hosted catalog content, pricing and configuration.
	Accounts Payable: Menu for Accounts Payable Dashboard, Invoices and Receipts.
	Supplier Management: Menu Supplier Management.
	Menu Search: Keyword search with clickable results.
	Quick Search: Click to access the Quick Search Menu.
	Bookmark: Click on the icon to view or edit your bookmarks and to create a new bookmark.

Top Banner

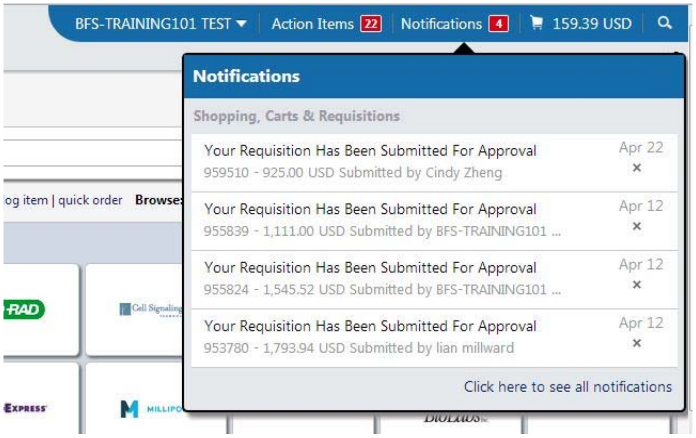
Action Items

- 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.



Notifications Tab in the Banner at the top of the page

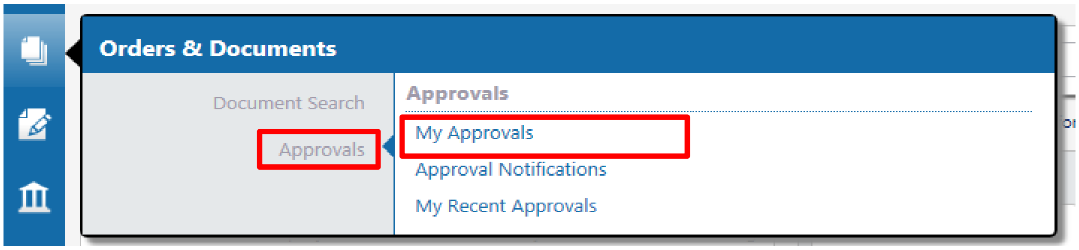
- Individual **notifications** will be listed.
- **Notifications** are based on the preferences you've set under **Personal Notifications**.
- You can delete **notifications** from the screen by clicking on **x** next to each notification message.
- New notifications highlighted in Banner.
- Clicking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



B. BearBuy Approvals (Worklist)

Accessing Approvals List

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

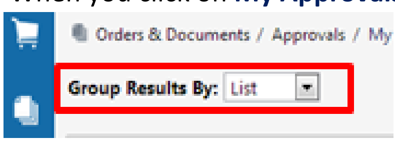


Note: If you will be out of the office and need to **assign a substitute approver** for a certain period of time, please submit a Help Desk[1] ticket stating:

- 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.

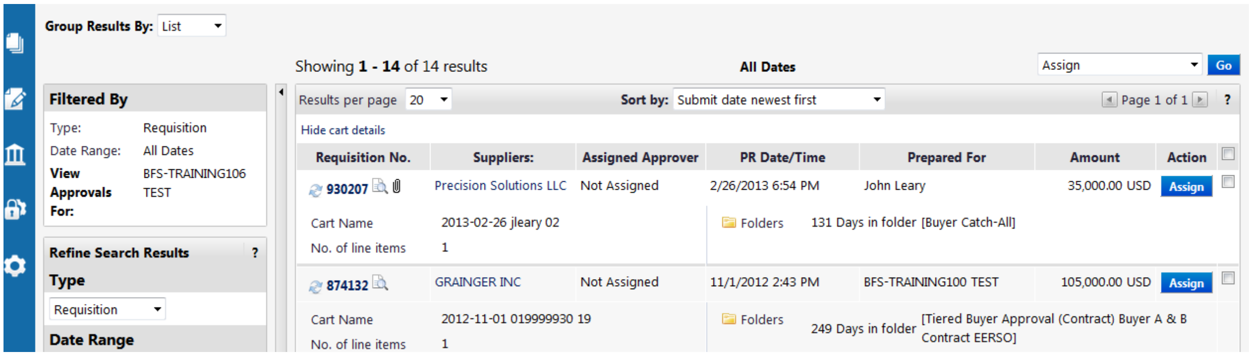
List vs Folder View

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).



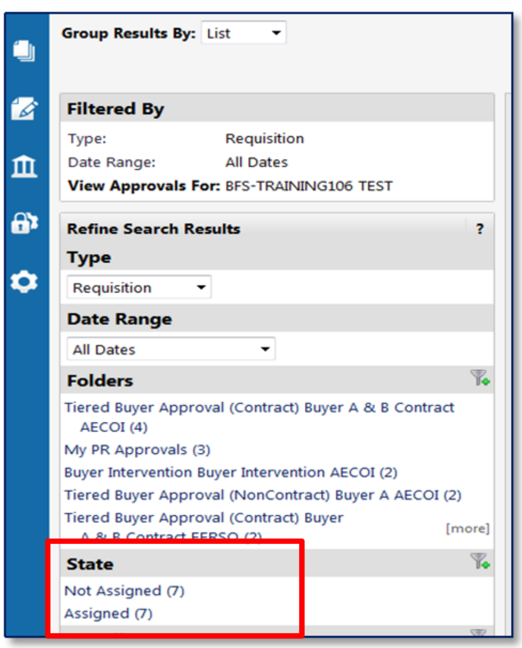
View by Folder[2]

[1] Help Desk email address is: bearbuyhelp@berkeley.edu

- 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.

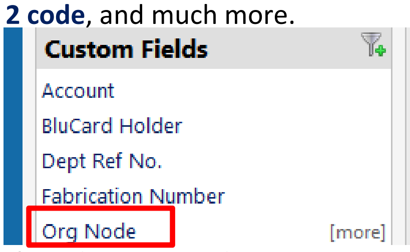
- ***Not Assigned***: Transaction is available to be worked on.
- ***Assigned***: Transaction is currently being reviewed by another user. Not available to be worked on by anyone else.
- ***Hold***: Transaction has been placed on hold pending further actions.

[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.

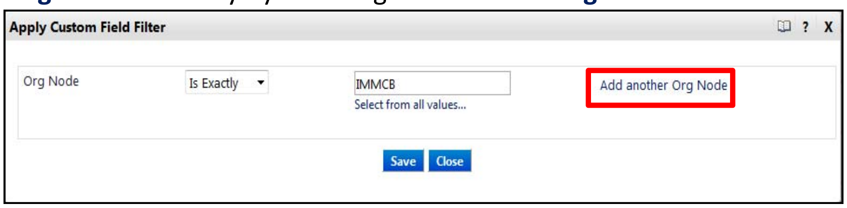
Managing My Approvals List

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.

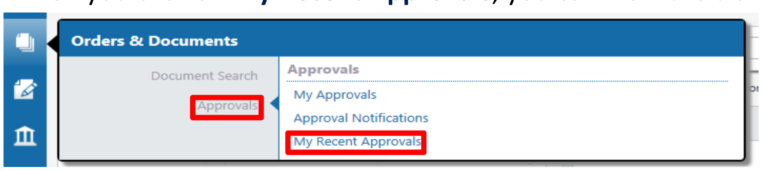


- If you have more than 1 **Org Node** you wish to filter your Approval list by, you'll have to enter each **Org Node** manually by selecting **Add another Org Node**.

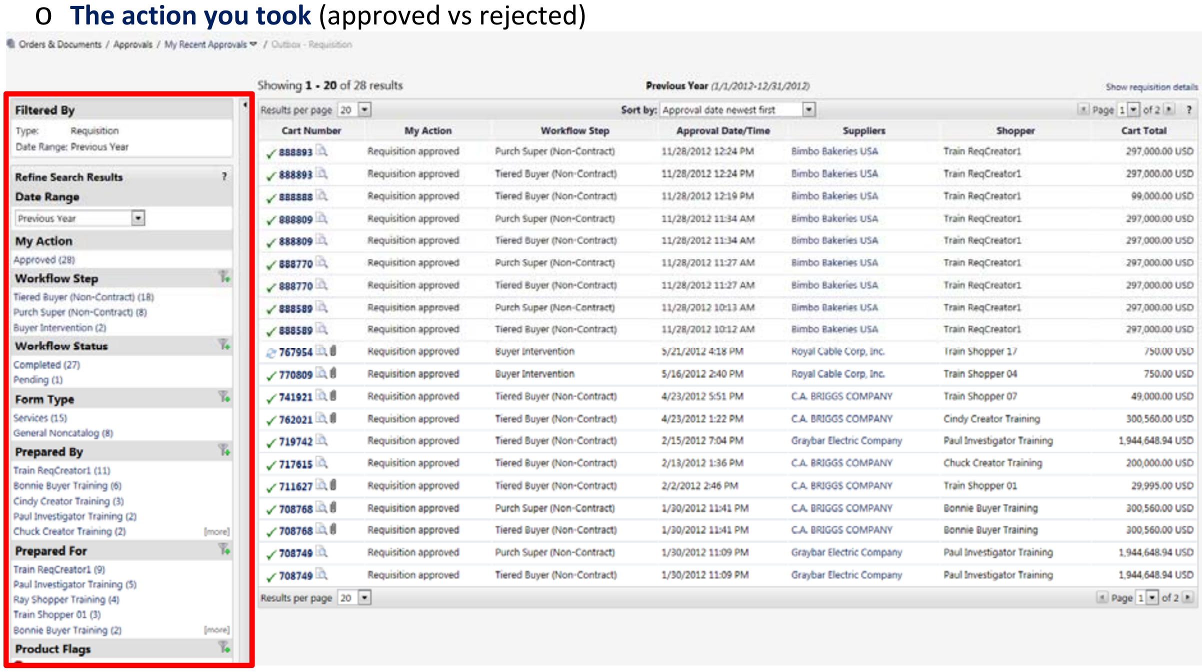


My Recent Approvals (Outbox)

- 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)

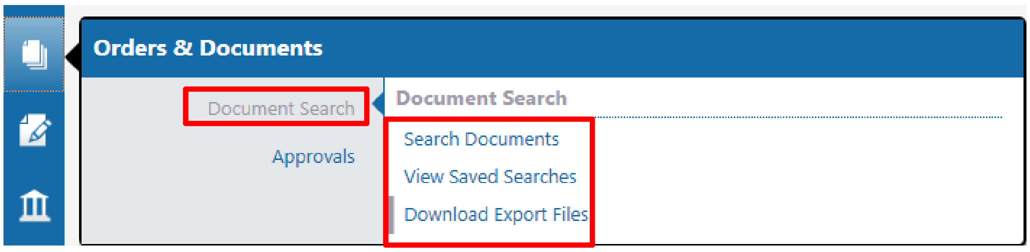


C. Document Search

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

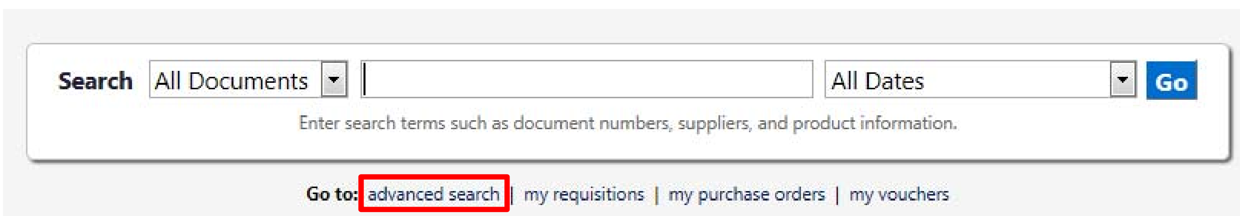
Accessing Document Search

- 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

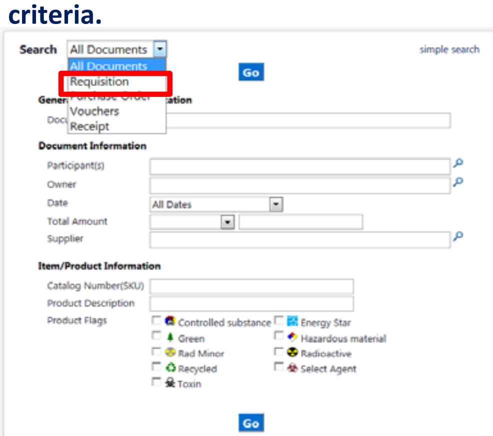


Advanced Document Search

- To select an **advanced Document Search** (where you can set search criteria) simply select **advanced search** below the search bar.

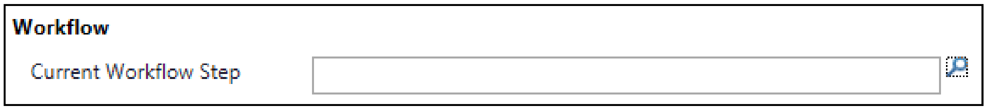


- After selecting **Requisitions** for the **search type**, you'll be able to see a large list of **additional filtering criteria.**

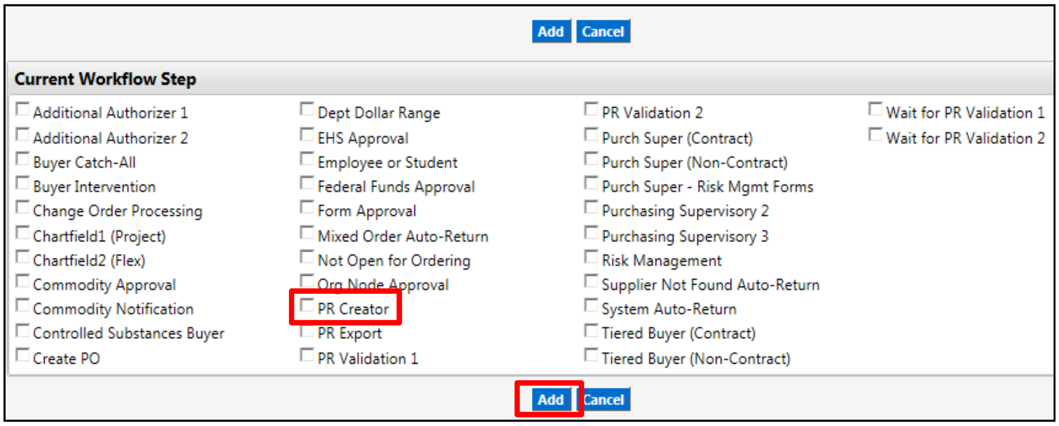


Managing My Approvals List

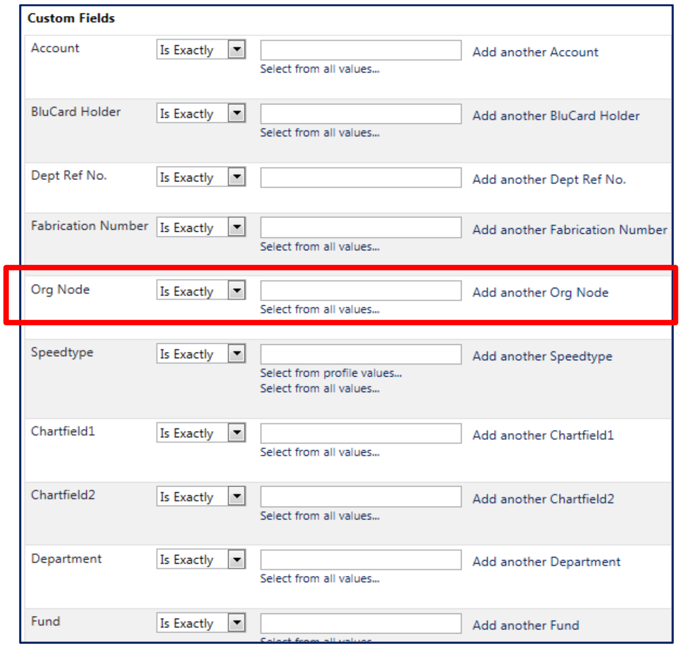
- To view a list of transactions that are pending review and approval from Document Search simply select the following criteria
  - Select **Current Workflow Step** (if you are a **Requisition Creator**, select **PR Creator**, etc)



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

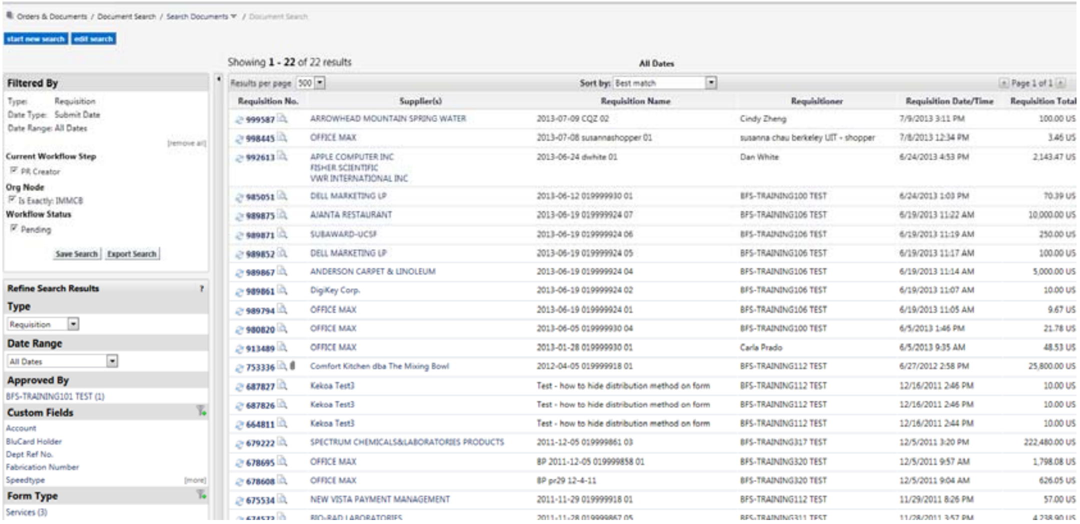


  - Add your **custom filed filter** (By **org node, fund,** etc). You can add more than one specific custom field (**Org Node, Fund Code, Account Code**, etc) by selecting **Add another [Custom Filed Name]**. Once entered, click **Go**.



Managing My Approvals List

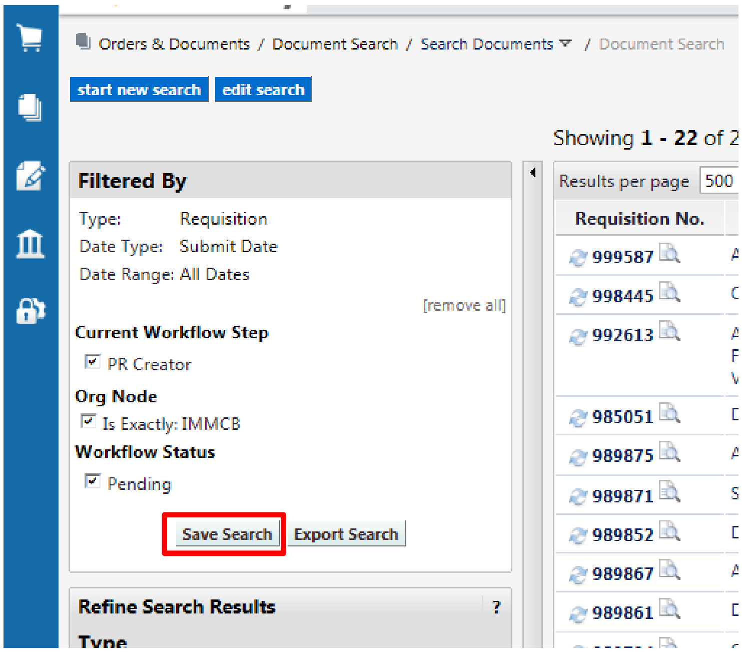
- The search will return all transactions that meet the criteria.
- You can **select** the transaction number and can **assign**, **review** and **approve** the transaction from here.



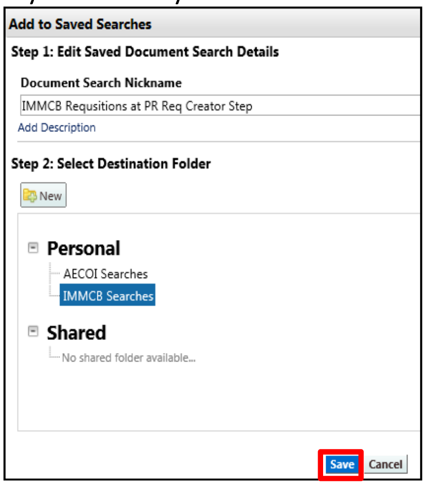
Note: You will not be able to tell if the transaction that comes up in your results has been assigned to someone else. You will have to open up each transaction individually to see the assign status.

Saving your search

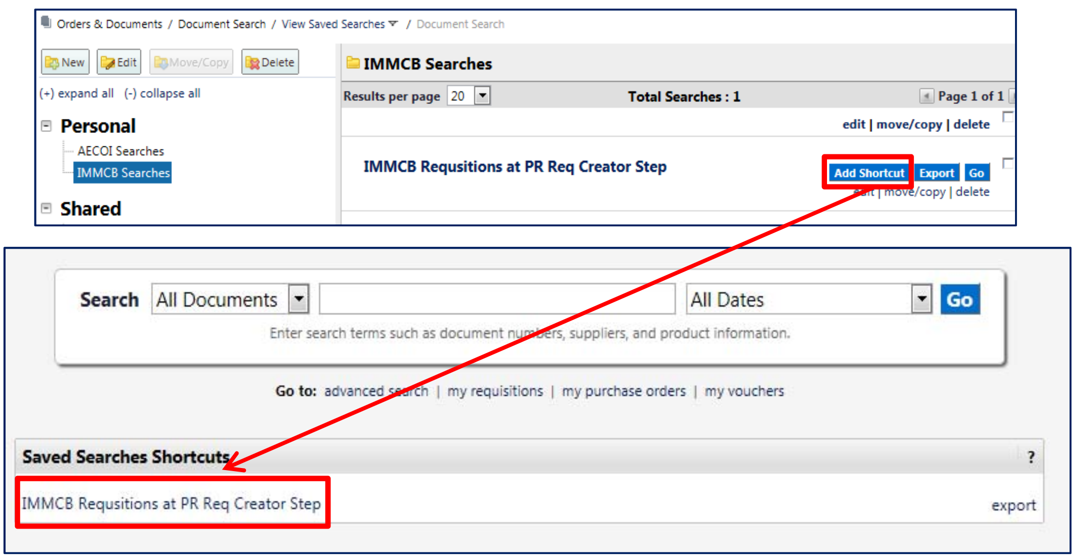
- You can **save** your search to be able to locate any current transactions that meet the criteria you set at
- You will first have to set your **search filter criteria** and then from the **search results** page, select **Save Search**.



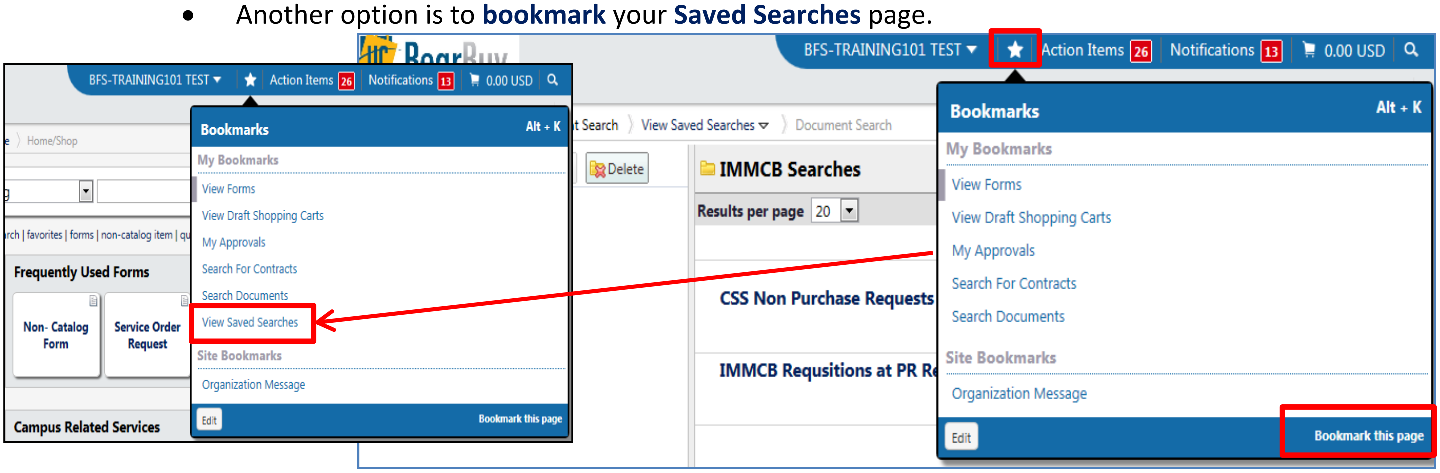
- Enter a name for your **Search** and select the appropriate **Personal Folder** and hit **save**.
    1. If you currently don't have a **Personal Folder,** select the New icon to add one.



- 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.