BearBUY: 21.3 New Feature Highlights

Supply Chain Management

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Reminder: BearBUY Unavailable

- **BearBUY will be unavailable** from **Friday, November 12, 2021 at 6:00PM ~ Sunday, November 14, 2021 at 9:00AM PST.**

- What to expect during the outage:
  - BearBUY will not be available.
  - **Please complete all BearBUY requests prior to the outage.**

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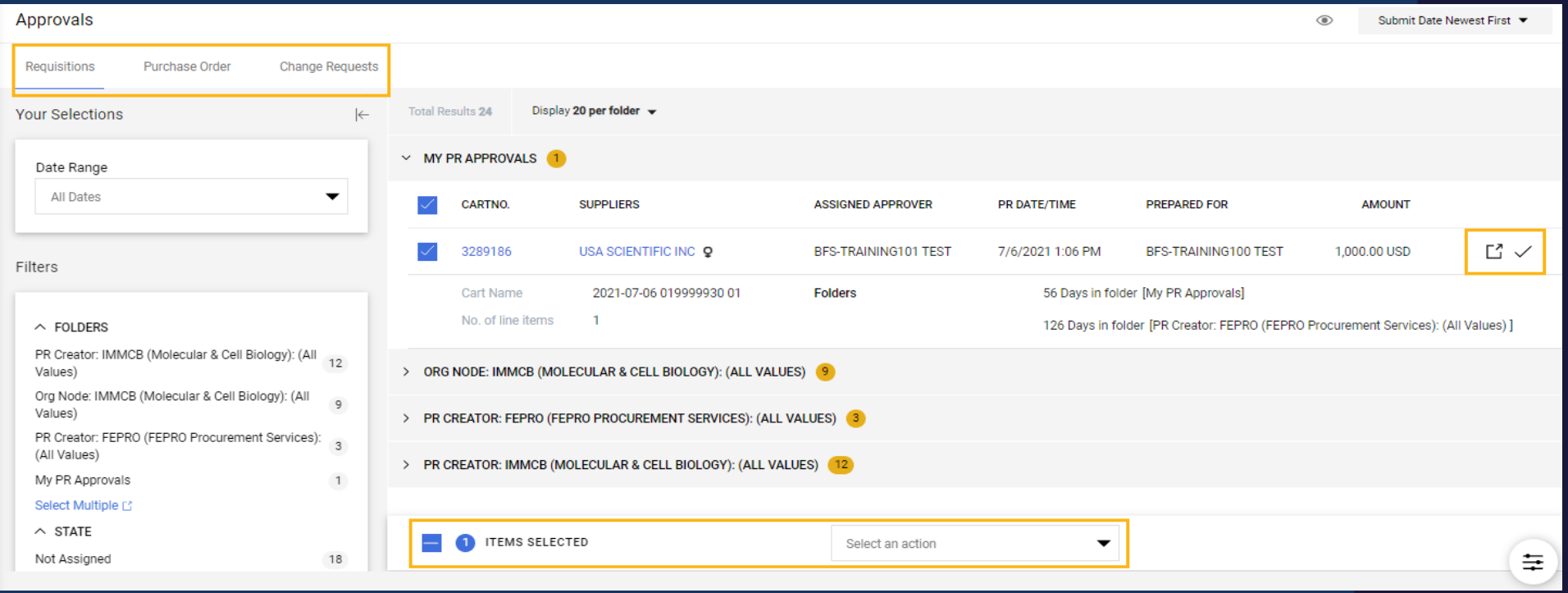
Enhancements in this Release

- User Interface/Experience Updates:
  - Approval Search
  - Draft Document Search for Invoices
  - Receipts
- Payment Request Form Instructions Updates
- Updates to Non-Catalog and Services forms

User Interface/Experience Update: **Approval Search**



New Experience View

- Instead of **Type** filter, there are tabs across the top of each page to access different approval types.
- **Actions Menu** now pops up when item is selected.
- **Quick View** and **Approve/Complete** options are moved to the far-right for each line.

Please Note: The New Experience View will be on by default; however, you will be able to toggle from New Experience View to Classic Experience View until the 22.1 Upgrade Release. The user experience will reset to the new experience view after each session.

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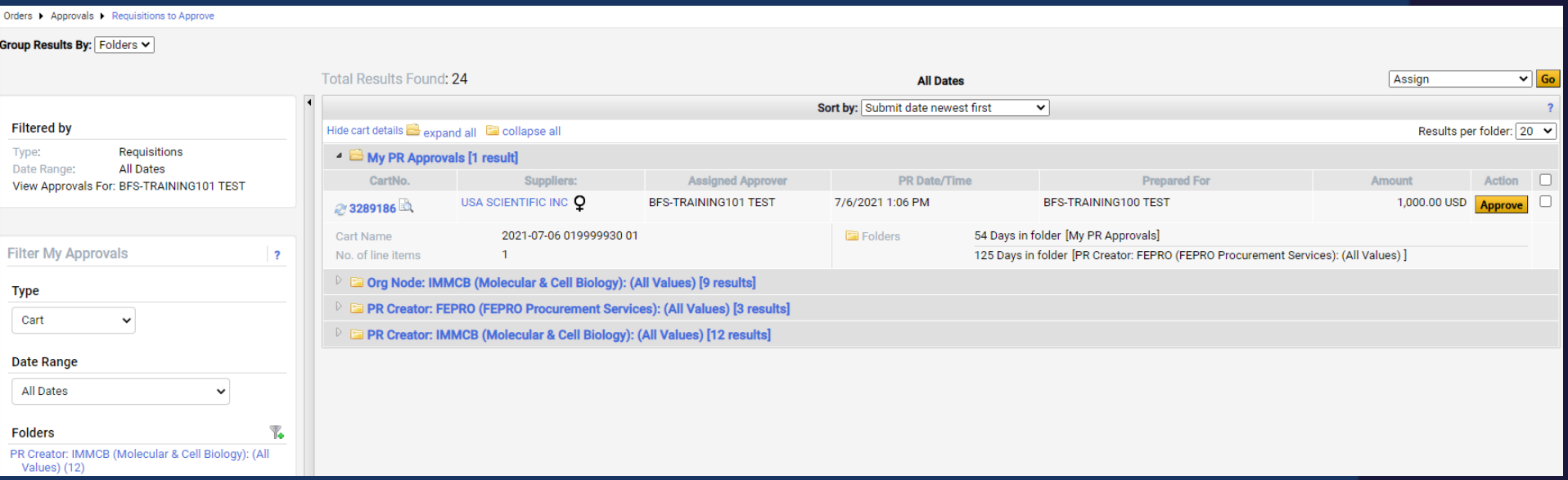
User Interface/Experience Update: **Approval Search**



Classic Experience View

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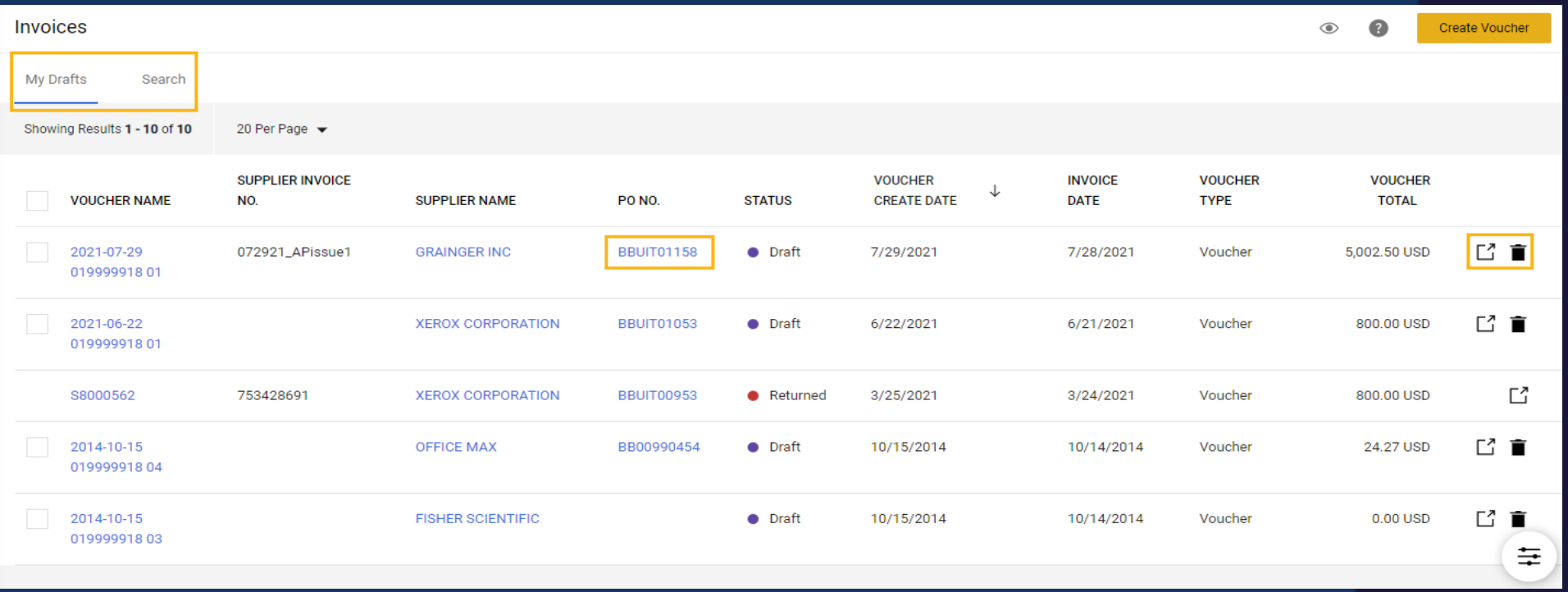
User Interface/Experience Update:
Draft Document Search for Invoices



New Experience View

- For Invoices, users can easily switch back and forth between **Draft** and **In Progress** document search.
- **PO numbers** associated with an invoice or voucher will have active links for users to click on to open the related PO.
- **Quick View** and **Delete** options moved to the end of each row.

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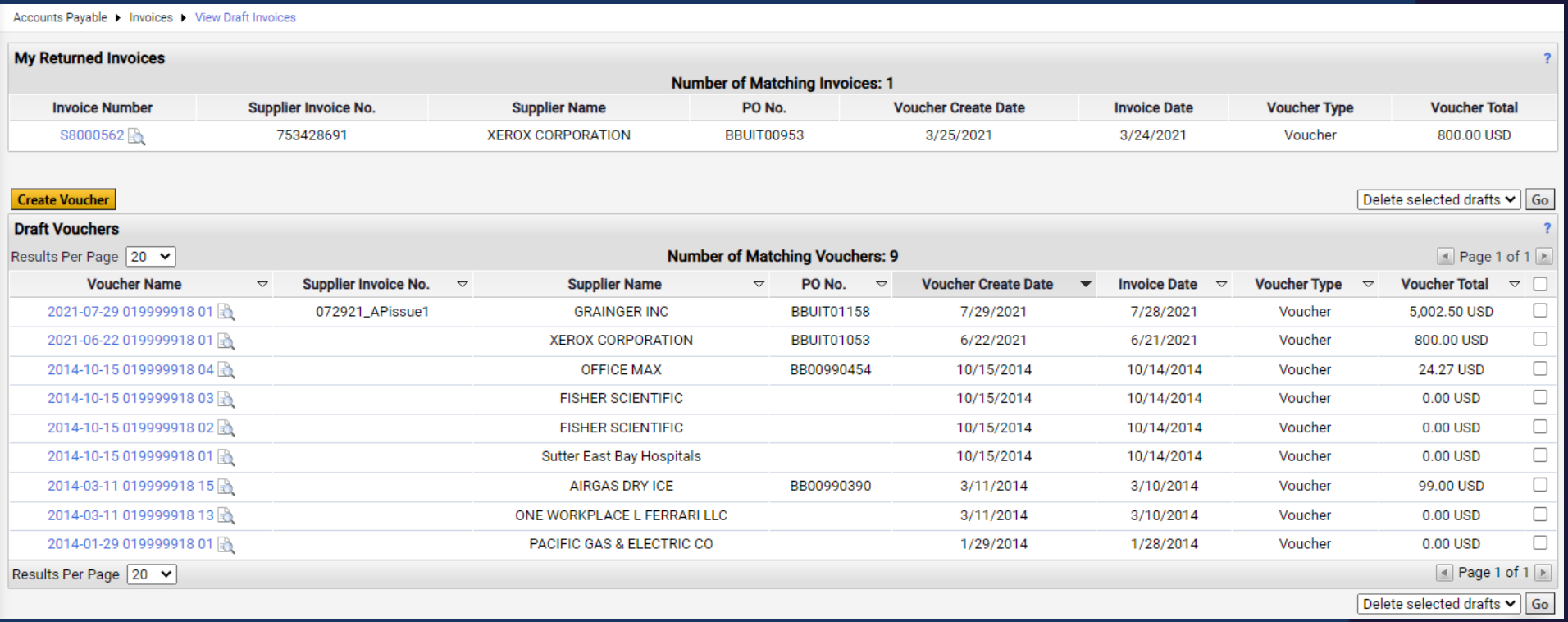
User Interface/Experience Update:
Draft Document Search for Invoices



Accounts Payable ▸ Invoices ▸ View Draft Invoices

My Returned Invoices

Number of Matching Invoices: 1

Invoice Number	Supplier Invoice No.	Supplier Name	PO No.	Voucher Create Date	Invoice Date	Voucher Type	Voucher Total
S8000562	753428691	XEROX CORPORATION	BBUIT00953	3/25/2021	3/24/2021	Voucher	800.00 USD

Create Voucher | Delete selected drafts | Go

Draft Vouchers

Results Per Page 20 | Number of Matching Vouchers: 9 | Page 1 of 1

Voucher Name	Supplier Invoice No.	Supplier Name	PO No.	Voucher Create Date	Invoice Date	Voucher Type	Voucher Total
2021-07-29 019999918 01	072921_APissue1	GRAINGER INC	BBUIT01158	7/29/2021	7/28/2021	Voucher	5,002.50 USD
2021-06-22 019999918 01		XEROX CORPORATION	BBUIT01053	6/22/2021	6/21/2021	Voucher	800.00 USD
2014-10-15 019999918 04		OFFICE MAX	BB00990454	10/15/2014	10/14/2014	Voucher	24.27 USD
2014-10-15 019999918 03		FISHER SCIENTIFIC		10/15/2014	10/14/2014	Voucher	0.00 USD
2014-10-15 019999918 02		FISHER SCIENTIFIC		10/15/2014	10/14/2014	Voucher	0.00 USD
2014-10-15 019999918 01		Sutter East Bay Hospitals		10/15/2014	10/14/2014	Voucher	0.00 USD
2014-03-11 019999918 15		AIRGAS DRY ICE	BB00990390	3/11/2014	3/10/2014	Voucher	99.00 USD
2014-03-11 019999918 13		ONE WORKPLACE L FERRARI LLC		3/11/2014	3/10/2014	Voucher	0.00 USD
2014-01-29 019999918 01		PACIFIC GAS & ELECTRIC CO		1/29/2014	1/28/2014	Voucher	0.00 USD

Results Per Page 20 | Page 1 of 1

Delete selected drafts | Go

Classic Experience View

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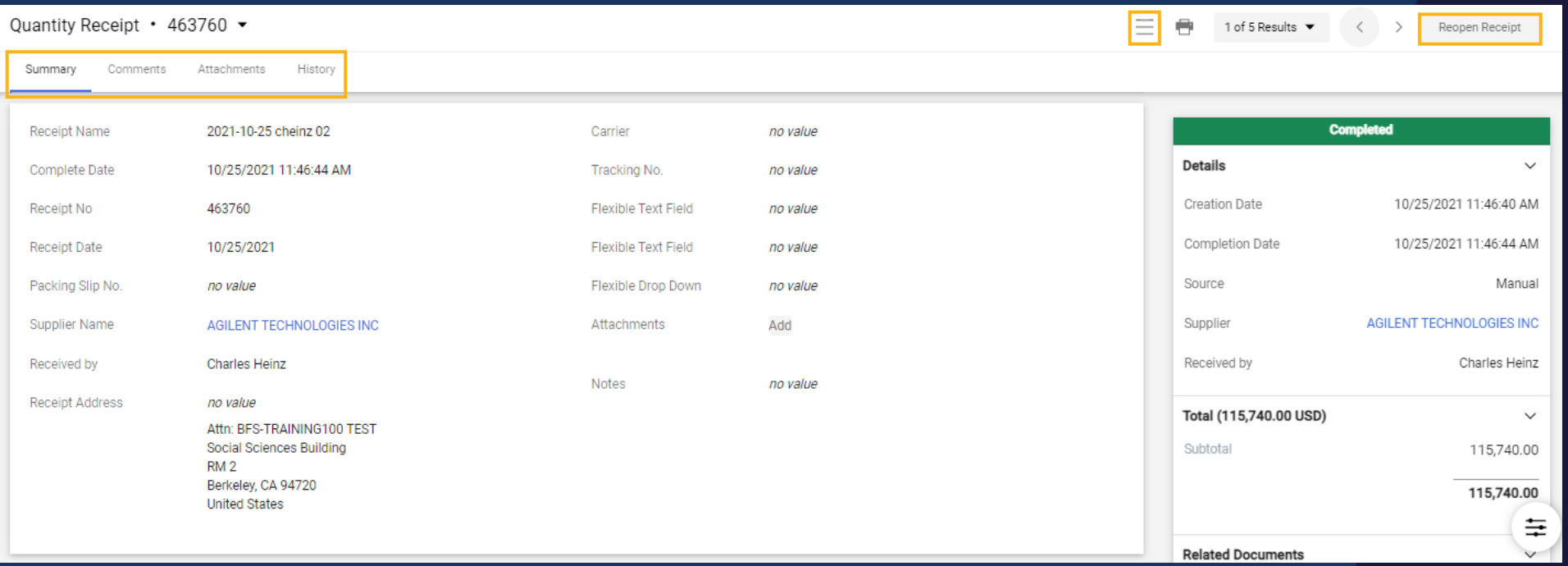
User Interface/Experience Update: **Receipts**



New Experience View

- New **Receipts** user interface aligns with the look and feel of the new experience by using tabs to access different pages at the top.
- **Action Button** has been moved to the upper righthand corner.
- **Hamburger** button hides and reveals sidebar menu.

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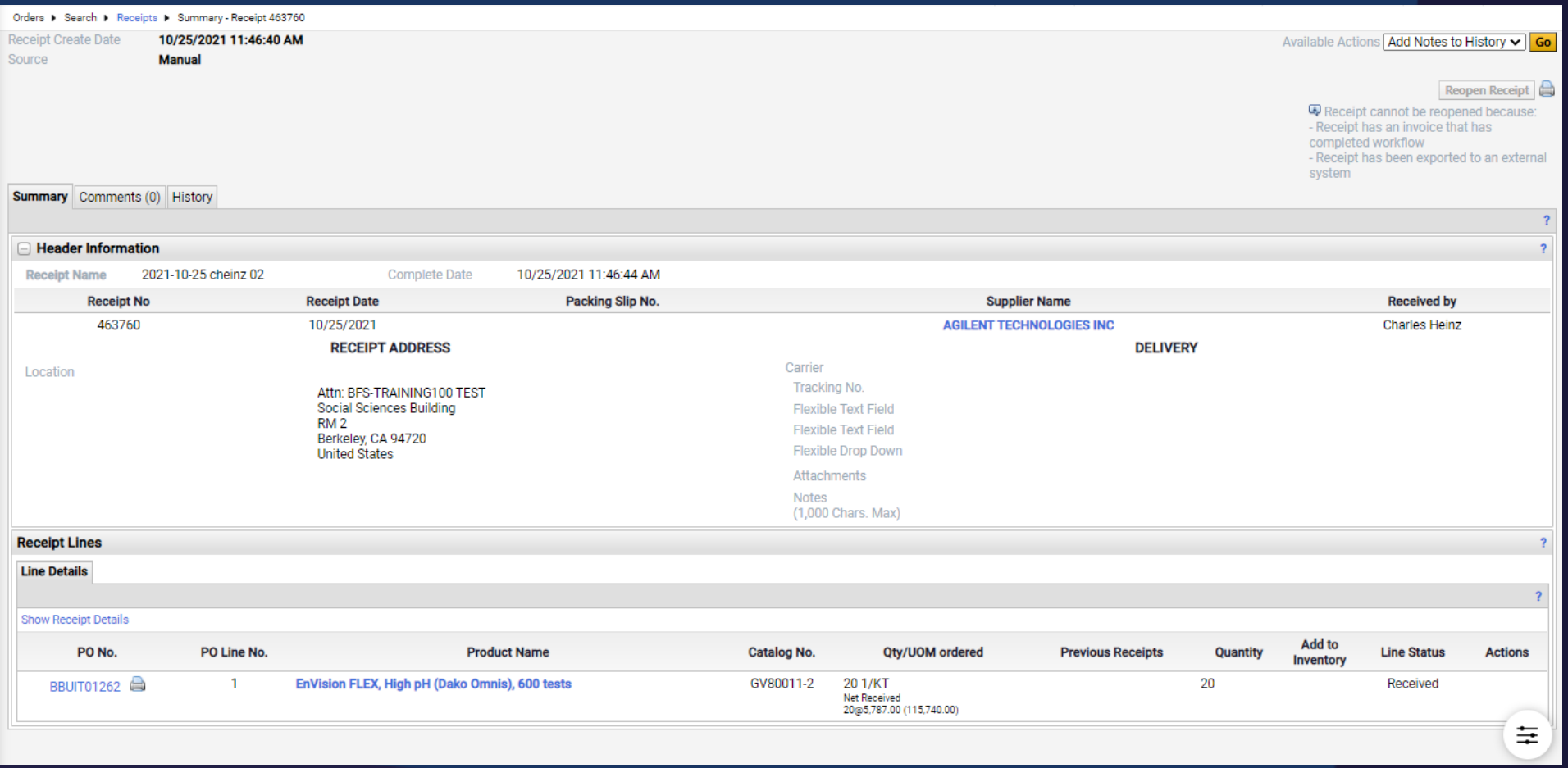
User Interface/Experience Update: **Receipts**



Classic Experience View

Form Updates for 21.3 Release

- **Payment Request** form Updates:
  - Updated Instructions to remove "Non-T&E Reimbursements" as an allowable expense type due to the creation of the new Reimbursement System.

- **Non-Catalog Items** and **Services & Non-Tangible Items** forms Updates:
  - Revised wording on Conflict of Interest and Data Security.
  - Project Manager Name is now Optional.
  - Sales Tax Defaults have been restored:
    - **Non-Catalog Items Sales Tax Default** = Taxable
    - **Services & Non-Tangible Items Sales Tax Default** = Non-Taxable
  - Default Employees Displaced to "No" since UCB has a standing policy not to outsource labor.
    - **NEW! Contracting Out for Covered Services** Webpage: https://supplychain.berkeley.edu/procurement/contracting-out-covered-services
  - **NEW! Buying Software and Cloud Computing Services** Webpage: https://supplychain.berkeley.edu/procurement/buying-software-and-cloud-computing-services

- Released updated training for new forms (released October):
  - **Non-Catalog Items** form Instructions: https://supplychain.berkeley.edu/sites/default/files/using_the_non-catalog_items_form_in_bearbuy.pdf
  - **Services & Non-Tangible Items** form Instructions: https://supplychain.berkeley.edu/sites/default/files/using_the_services_and_non-tangible_items_form_in_bearbuy.pdf

Berkeley Regional Services (BRS) Support for Assistance with Purchases

- BEARS (Admin Depts and Other Units)
  - Email: bearspurchasing@berkeley.edu
- BEST (Biological Sciences)
  - Email: bestpurchasingsupport@lists.berkeley.edu
- CHaMPS (Physical Sciences)
  - Email: champs_purchasing@berkeley.edu
- ERSO (Engineering Research Support Organization)
  - Email: ersopurchasing@erso.berkeley.edu
- ProS (Professional Schools)
  - Email: ProSPR@berkeley.edu
- SHARE (Soc Sciences, A & H, Undergrad)
  - Email: share_purchasing@berkeley.edu

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Central Support

- BearBUY Help Desk
  - Phone: 510-664-9000 Option 1, Option 2 (M-F: 8 am – 5 pm)
  - Email: bearbuyhelp@berkeley.edu (ServiceNow Ticket)
- Accounts Payable (Payable Vouchers, Invoices, and Payments)
  - Email: disburse@berkeley.edu (ServiceNow Ticket)
- Vendoring Team (Supplier Onboarding and Updates)
  - Email: vendoring@berkeley.edu
- ITCS (IT Client Services)
  - Phone: 510-664-9000 Option 1, Option 1 (M-F: 8 am – 5 pm)
  - Email: itcshelp@berkeley.edu (ServiceNow Ticket)