BearBUY: Shopping With Forms & More

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Table of Contents

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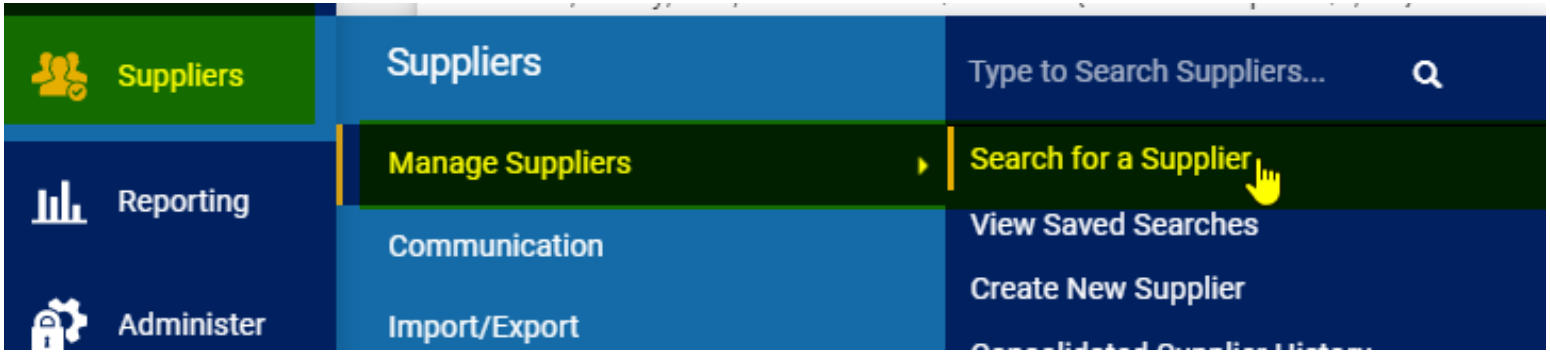
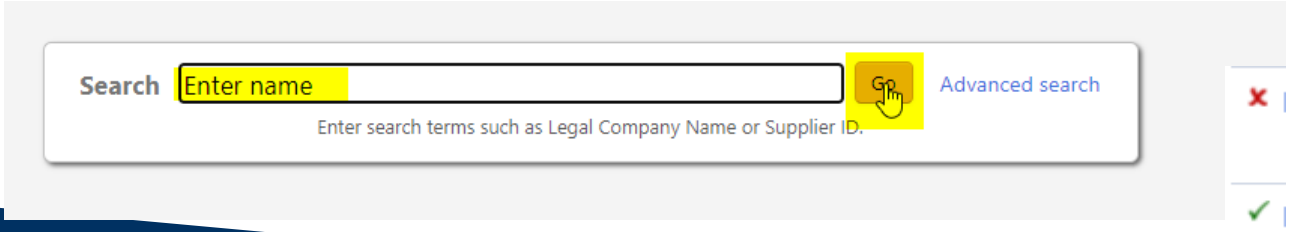
Looking Up Vendor in BearBUY

- Navigate to Suppliers > Manage Suppliers > Search for a Supplier
- Enter the name and click search
- Check that the supplier is active, if it is active there is a green check mark or a red mark if the supplier is inactive





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Elastic Search 1 of 3

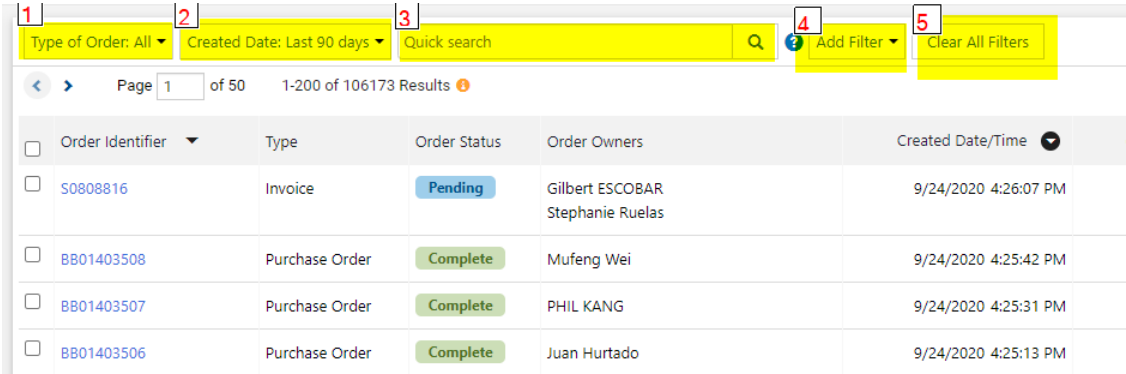
1. In this section users can narrow down transaction results by clicking on "Type of Order"

2. The date placeholder will default to "Last 90 days" regardless of transaction type

3. Quick search allows the following:

- Combine Search Example: "BB12345678" or "BB24681012" or any combination of POs, vouchers, receipts, invoices etc
- Search for a Phrase Match: Search a keyword that could be related to an order type and it will pull up any results related to that keyword. Using the keyword "Office Depot" will pull up all transactions that have the keyword "Office Depot"
- Exclude Words from a search: By placing a dash in front of a word it will exclude anything related to that keyword in a search result. Example: if in your search result you did not want to include "Fisher Scientific" simply place a "-" in front of the name: "-Fisher Scientific"
- Search for Wildcards: This means that if the user places a "*" in front of any keyword or number it will pull up anything that contains it. Example: if "*1234" is used then it will pull up all transactions that include "1234"
- Search for place holder: This allows the user to insert a placeholder in a sequence by placing a "?". An example of this would be: "1234??6" this means that it will pull all results that starts with "1234" and ends with "6"

-It is important to note that users cannot search multiple transactions in the Simple Search box. One of the functions above will allow the user to search multiple transactions. If the user tries to do a mass search it will return no results



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Elastic Search 2 of 3

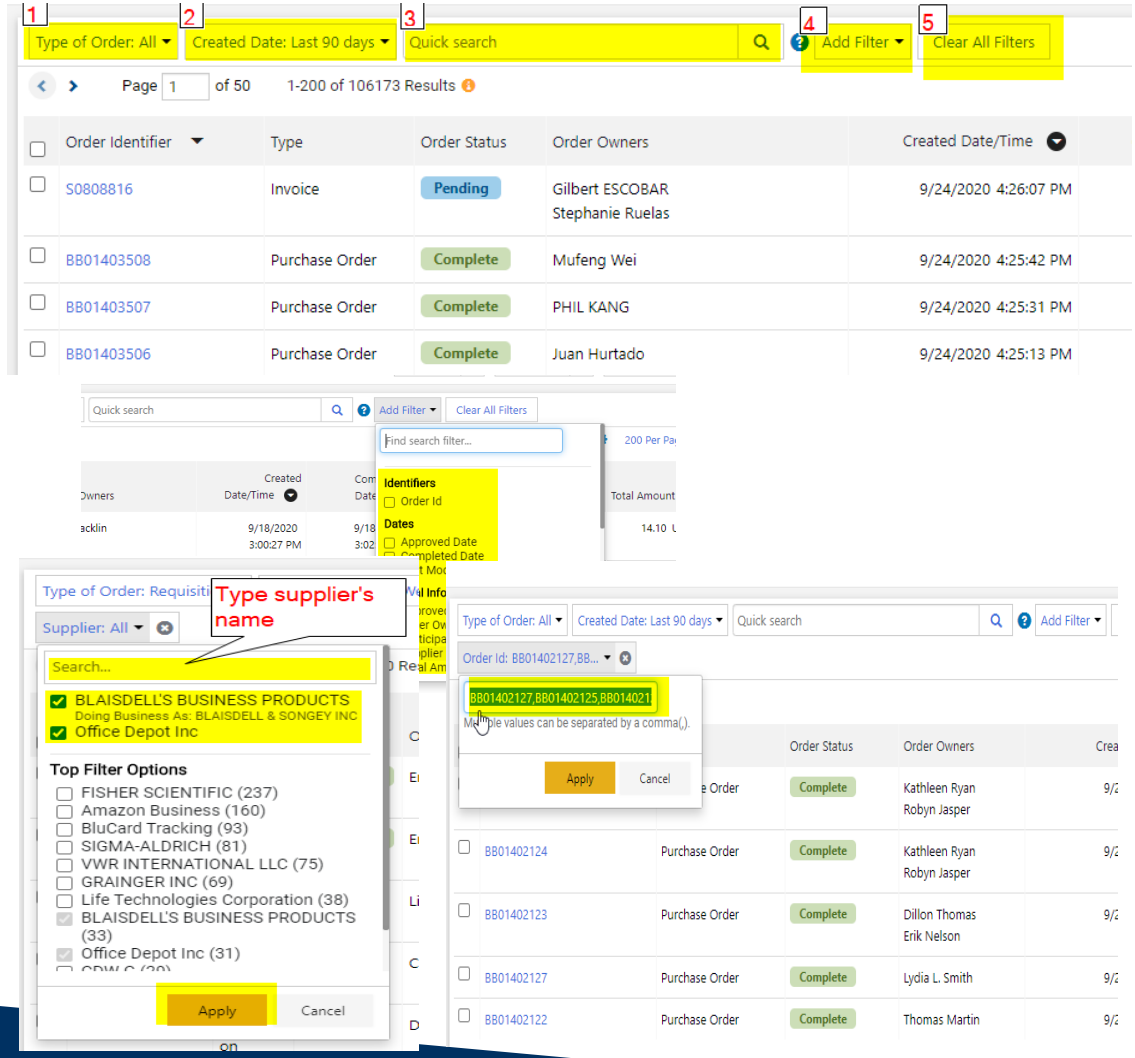
4. Quick Search filters to the right are filters that users can select to narrow down their search

- By clicking on one of the boxes it will place the new filter to the top of the search and add a dropdown to narrow down the search further. In the case below "Supplier" was selected

- In the example to the right, the user has the ability type in the supplier's name and can select multiple suppliers at a time

- Additionally, if the user has a list of transactions that they want to search, they can click on the "Order ID" and paste all the results in the search box and click "Apply". The search is intuitive enough to place commas in between each PO.

5. By Clicking on the "Clear All Filters" button it will return the search results to the default



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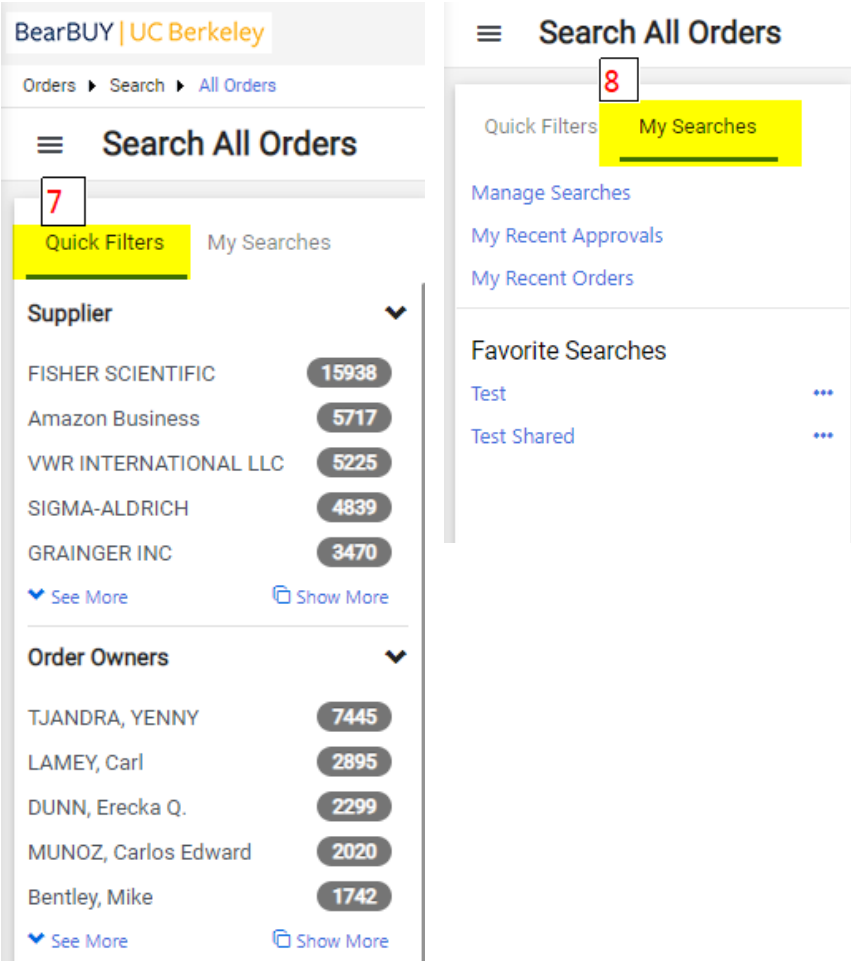
Elastic Search 3 of 3

7. Allows users to filter out results by corresponding categories such as Supplier, Order Owners, Product Flags, etc.

8. My Searches allows users to view any searches that have been saved by the user



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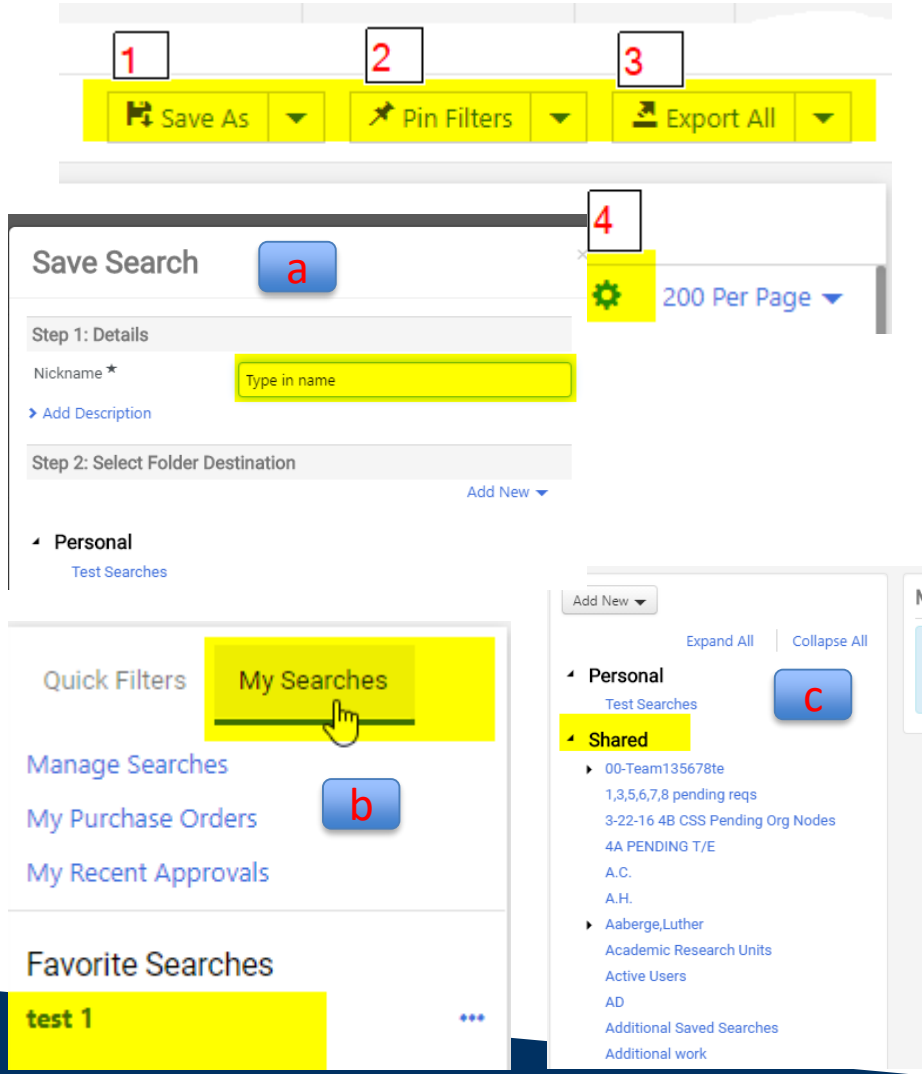
Advanced Search (Slide 1 of 3)

1. Save As: Any search that users have created has the ability to save the custom search.

a. Click on the “Save As” link, name the search, and choose the appropriate folder to save the search to. The user has the ability to save it to their Personal Folder or a shared folder. (A shared folder may be given access by any other user of that folder)

b. To access favorite saved searches navigate back to the “My Searches” and click on the link/links under the “Favorite Searches”

c. To access a shared search navigate to “My Searches” > “Manage Searches” and click on the shared search



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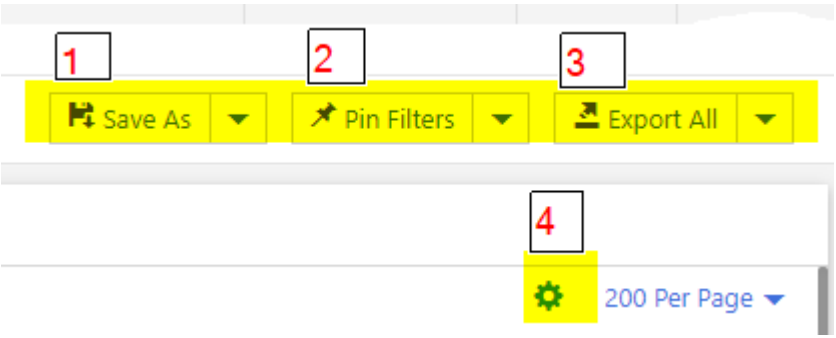
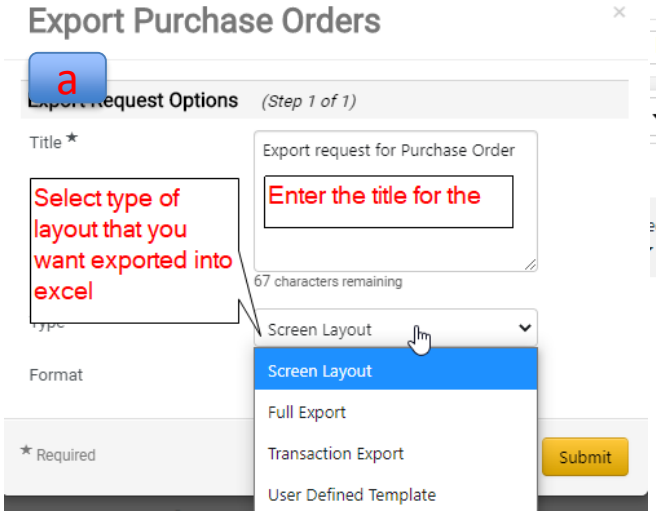
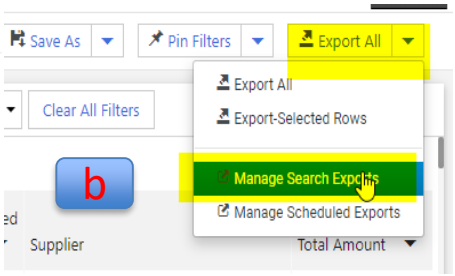
Advanced Search (Slide 2 of 3)

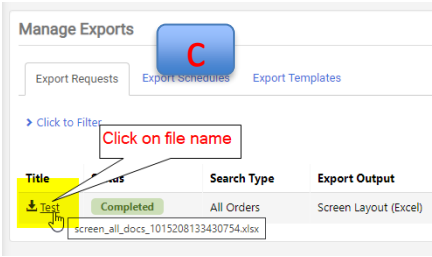
2. On the top-right hand corner users can save filters by Pinning them
- By clicking on the "Pin Filters" button will be the default search setting every time the user logs in

3. When Export All is clicked the next page will request a Title and other options for the file
a. Enter the Title and select format
b. To retrieve the file navigate to the "Export All" Button and click on the down arrow which will then display " Manage Search Exports"
c. Once the link is clicked, another page will appear where users can download the file









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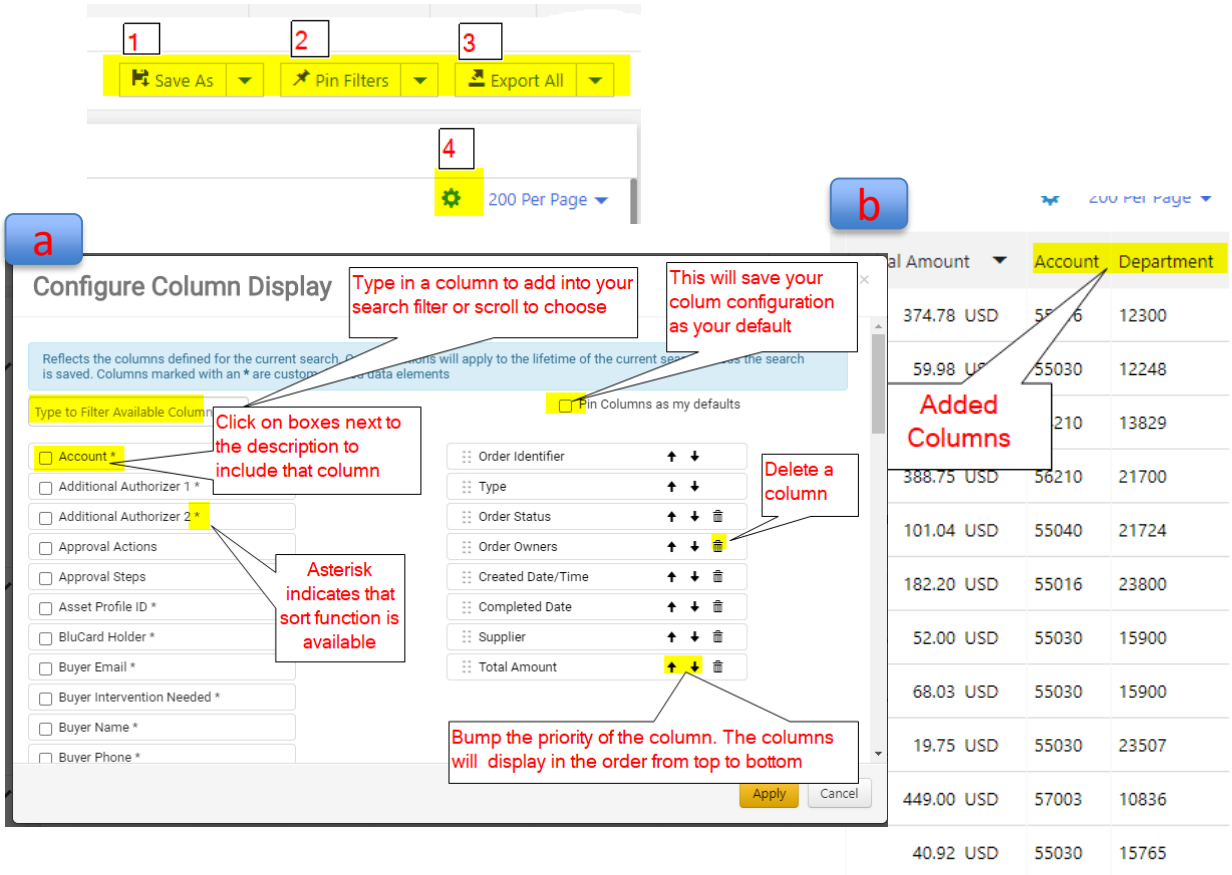
Advanced Search (Slide 3 of 3)

4. Configure Columns allows the user to choose the criteria that they want displayed in the search results. Click on the gear icon (top right corner) and select the desired filters.

a. Click apply once desired columns are selected and it will display in the search

- Additionally, users have the ability to drag columns to the left and right of one-another in the search
- Columns notated with an asterisk have the ability to sort.

b. Selected columns will appear in the new search



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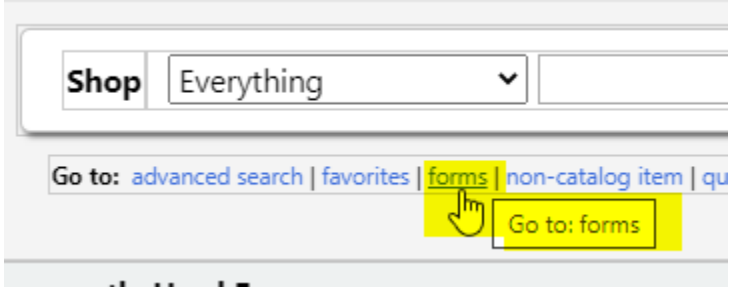
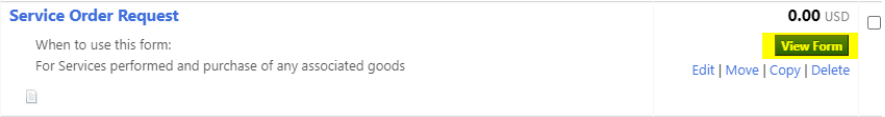
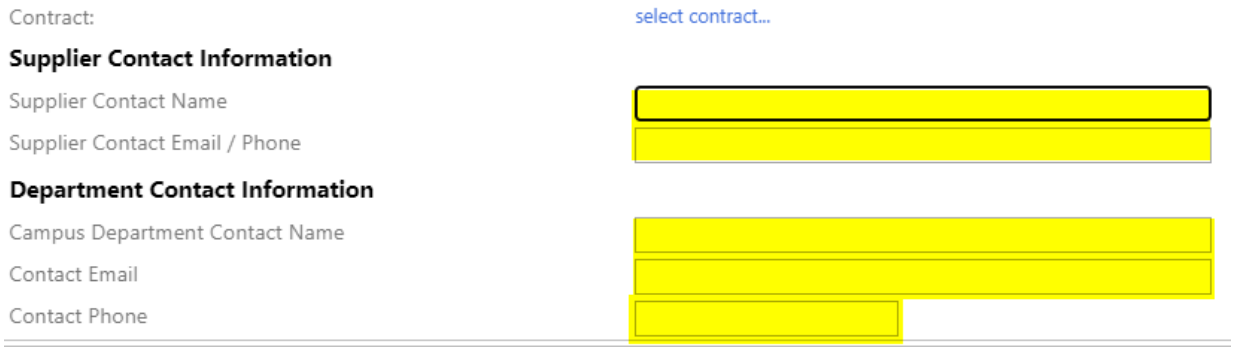
Create A Service Form 1 of 3

- Click on the “forms” link on the homepage
- Navigate to Service Order Request and click View Form
- Enter the form information sections:
  - Supplier & Contact Information







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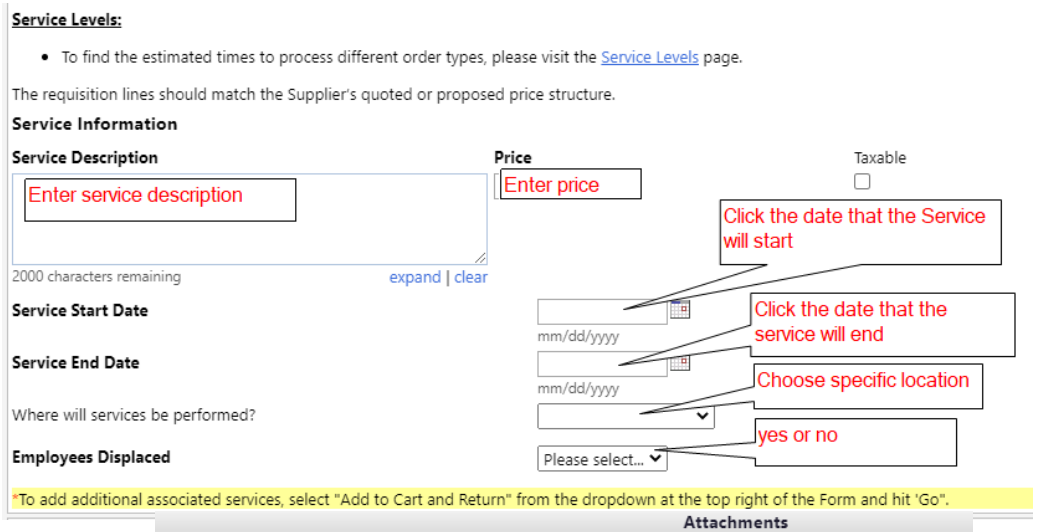
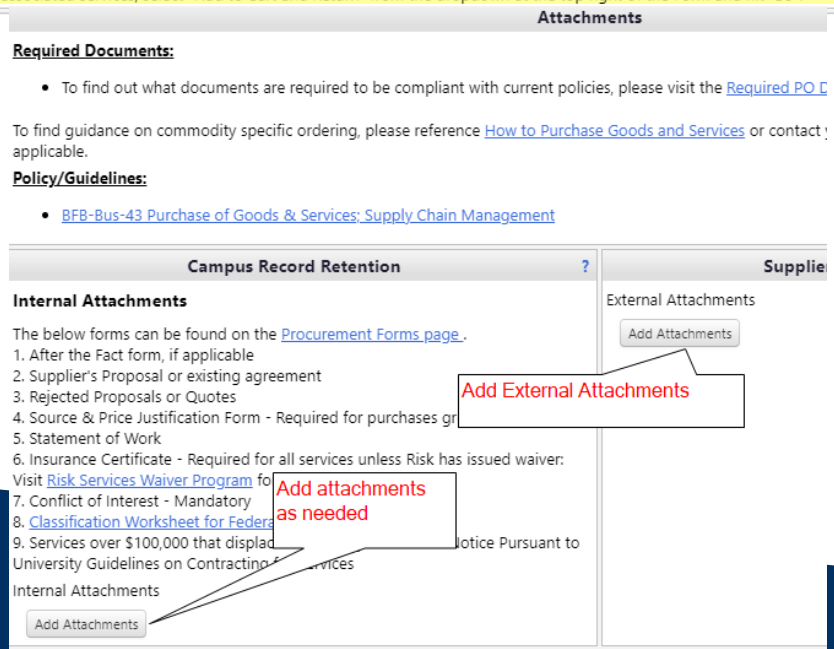
Create A Service Form 2 of 3

- Order Information
  - Fill out the Service Description, price and service start/end date
- Attachments
  - Review attachment documents for PO
- Campus Retention
  - Review and attach necessary documents
- Supplier Required Documents
  - These are documents the supplier can see





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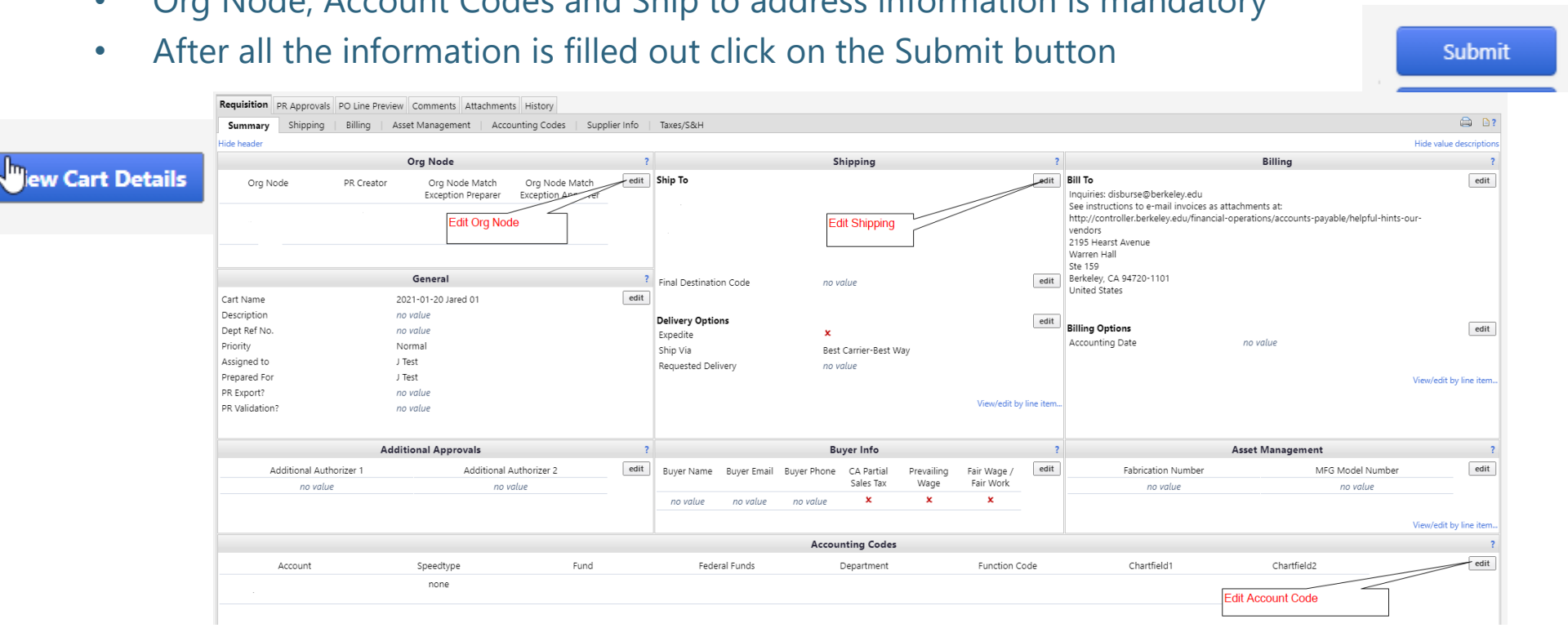
Create A Service Form 3 of 3

- Click “Add and go to Cart”
- Click on “View Cart Details”
- Org Node, Account Codes and Ship to address information is mandatory
- After all the information is filled out click on the Submit button



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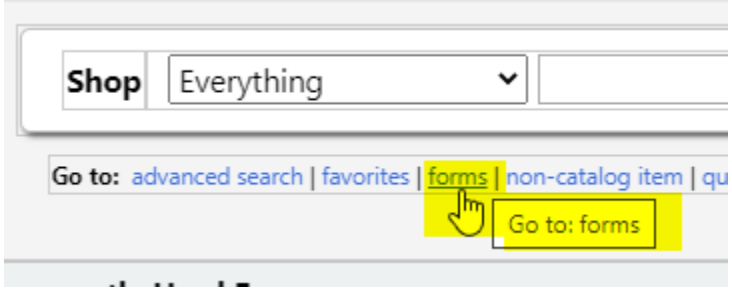
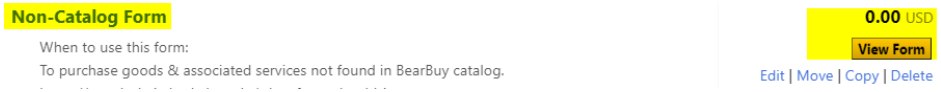
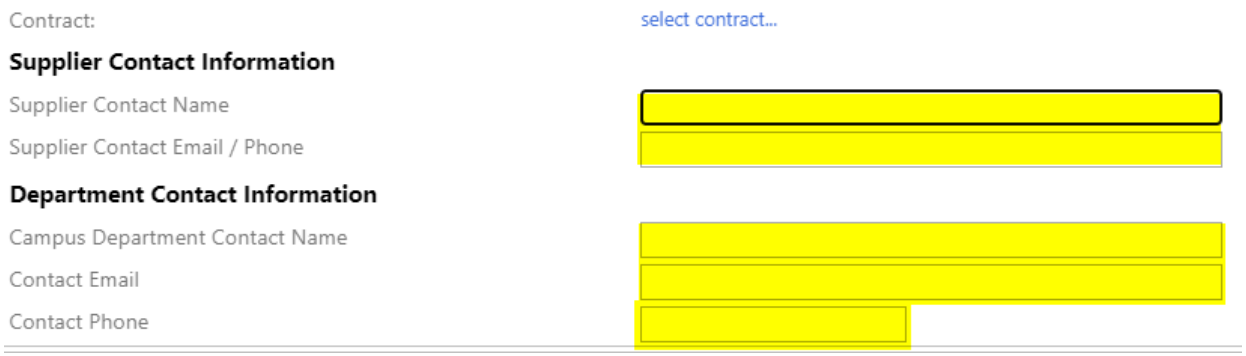
Create A Non-Catalog Form 1 of 4

- Click on the “forms” link on the homepage
- Navigate to Non-Catalog Form and click View Form
- Enter the form information sections:
  - Supplier & Contact Information







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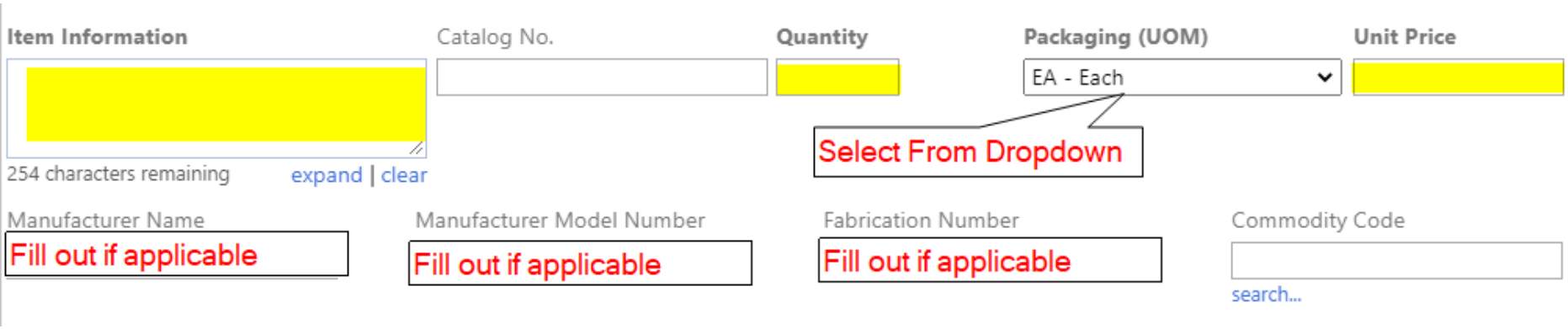
Create A Non-Catalog Form 2 of 4

- Order Information
  - Fill out the item information, quantity, price and UOM
  - Review attachment documents for PO



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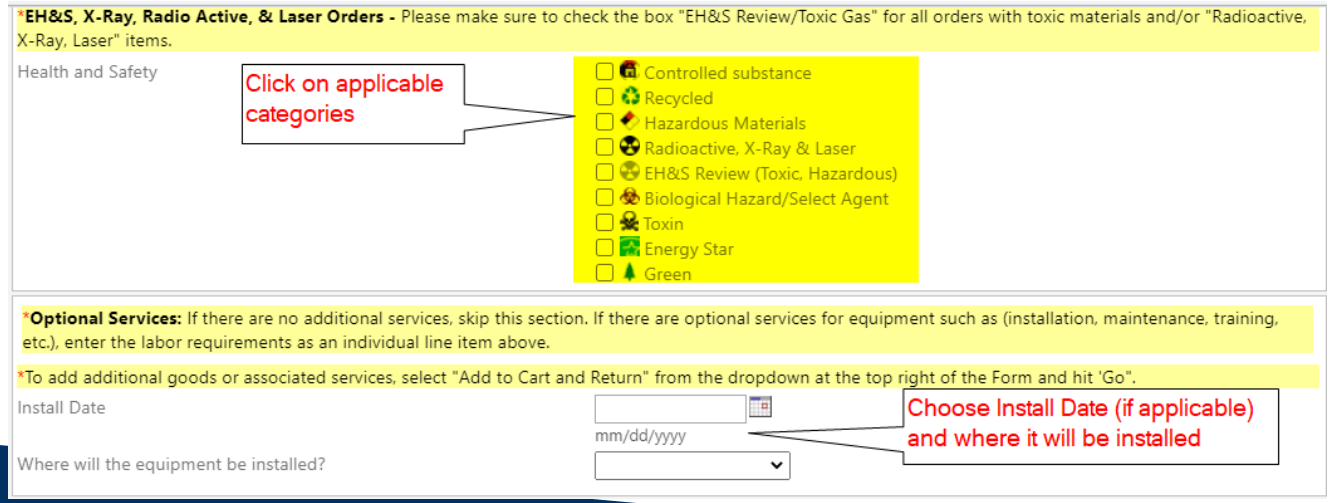
Create A Non-Catalog Form 3 of 4

- Health and Safety
  - Click on all applicable categories
- Optional Services
  - N/A if there are no services otherwise fill out the necessary field
- Attachments
  - Add necessary attachments for the PO



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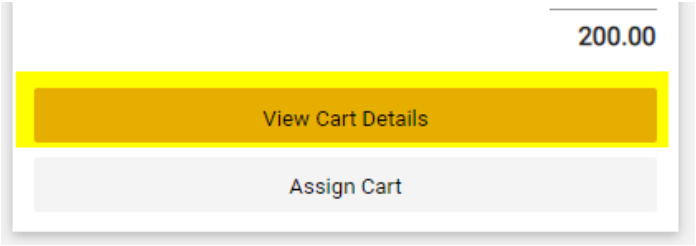
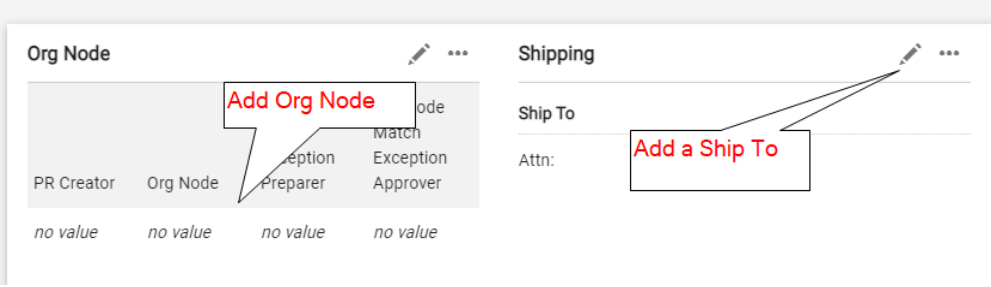
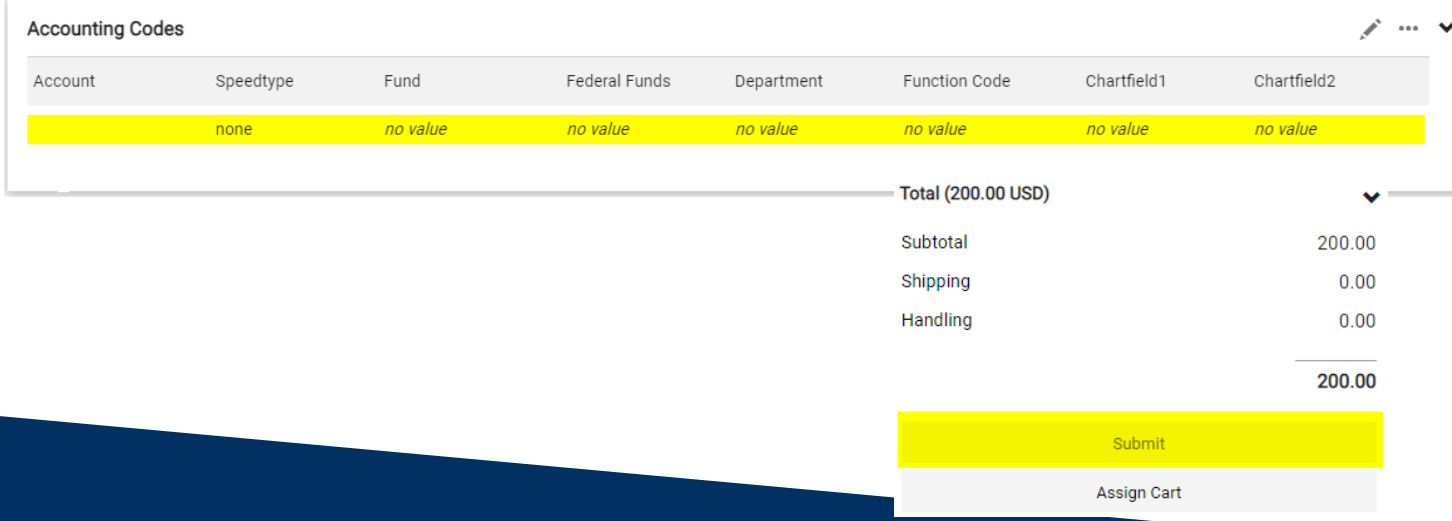
Create A Non-Catalog Form 4 of 4

- Click “Add and go to Cart”
- Click on “View Cart Details”
- Org Node, Account Codes and Ship to address information is mandatory
- After all the information is filled out click on the Submit button







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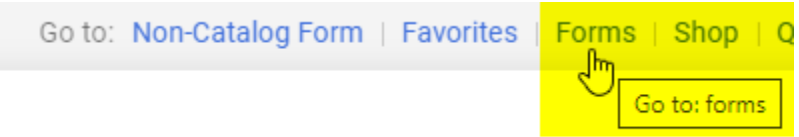
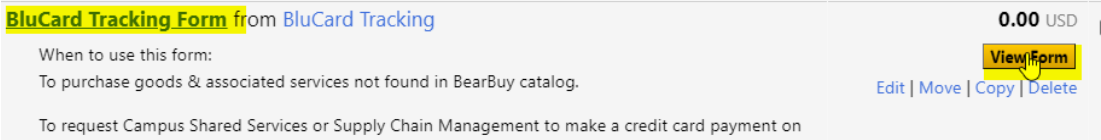
BluCard Form 1 of 3

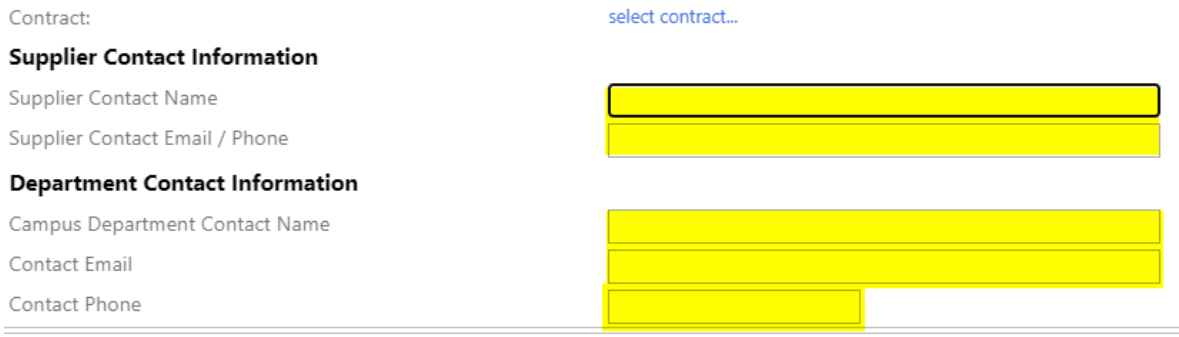
- Click on the “forms” link on the homepage



- Navigate to BluCard Tracking Form and click View Form



- Enter the form information sections:
  - Supplier & Contact Information



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BluCard Form 2 of 3

- Choosing the correct BluCard dropdown from the list
- Fill out the Supplier Contact Information
- Fill out the Department Contact Information

When not to use this form:

- ATF one time payments.
- Supplier will accept a PO for goods or services order.
- For inventorial equipment or fabrications valued over $4999.99

Supplier	BluCard Tracking
Fulfillment Address	001, BFS ID: 0000821867: 1608 4th Street, 217 Berkeley, CA 94710 US
Please select one of the following:	Please select...

Please select...
Please select...
Order HAS BEEN placed with a BluCard
Order HAS BEEN placed with my BluCard
Order WILL BE placed with a BluCard
Order WILL BE placed with my BluCard

Supplier &

Supplier Contact Information

Suggested Supplier Name

Supplier Contact Name

Supplier Contact Email / Phone

Supplier Contact Information

Suggested Supplier Name

Supplier Contact Name

Supplier Contact Email / Phone

Department Contact Information

Campus Department Contact Name

Contact Email

Contact Phone

For procurement instructions, please visit Supply Chain Management – Procurement website.

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BluCard Form 3 of 3

- Order Information
  - Fill out the Item Description, price, quantity, Catalog No, manufacturer information/model/Fabrication number
  - Install Date and where it will be delivered
- Internal Document Attachments
  - Review and attach necessary documents
- External Attachments
  - These are documents the supplier can see
- Click “Add and go to Cart” and click “Go”

Order Information

Item Information | Catalog No. | Quantity | Unit Price

254 characters remaining expand | clear

Manufacturer Name | Manufacturer Model Number | Fabrication Number

*EH&S, X-Ray, Radio Active, & Laser Orders - Please make sure to check the box "EH&S Review/Toxic Gas" for all orders with toxic materials and/or "Radioactive, X-Ray, Laser" items.

Health and Safety

- Controlled substance
- Recycled
- Hazardous Materials
- Radioactive, X-Ray & Laser
- EH&S Review (Toxic, Hazardous)
- Biological Hazard/Select Agent
- Toxin
- Energy Star
- Green

*Optional Services: If there are no additional services, skip this section. If there are optional services for equipment such as (installation, maintenance, training, etc.), enter the labor requirements as an individual line item above.

*To add additional goods or associated services, select "Add to Cart and Return" from the dropdown at the top right of the Form and hit 'Go".

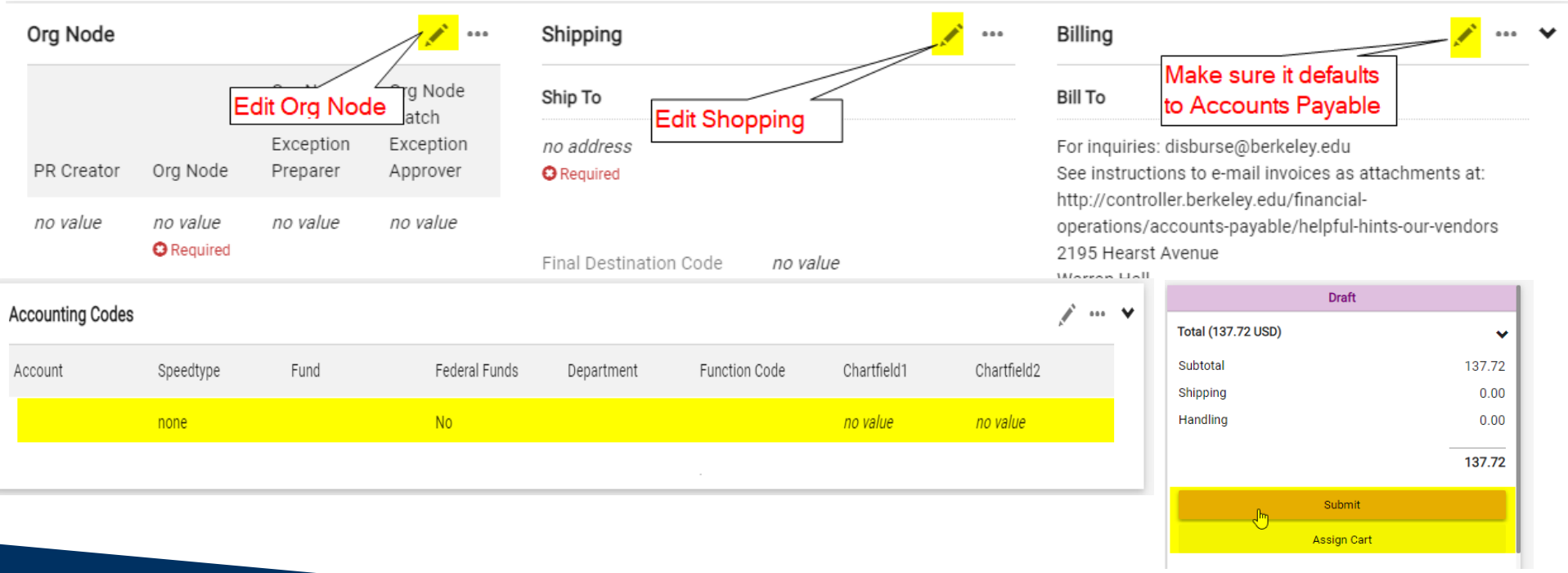
Install Date mm/dd/yyyy

Where will the order be delivered?

Available Actions: Add and go to Cart Go

BluCard Form 4 of 4

- Click “Add and go to Cart”
- Click on “View Cart Details”
- Org Node, Account Codes and Ship to address information is mandatory
- After all the information is filled out click on the Submit button



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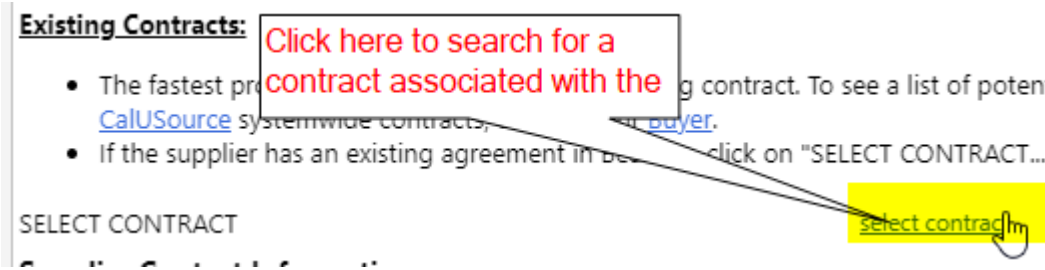
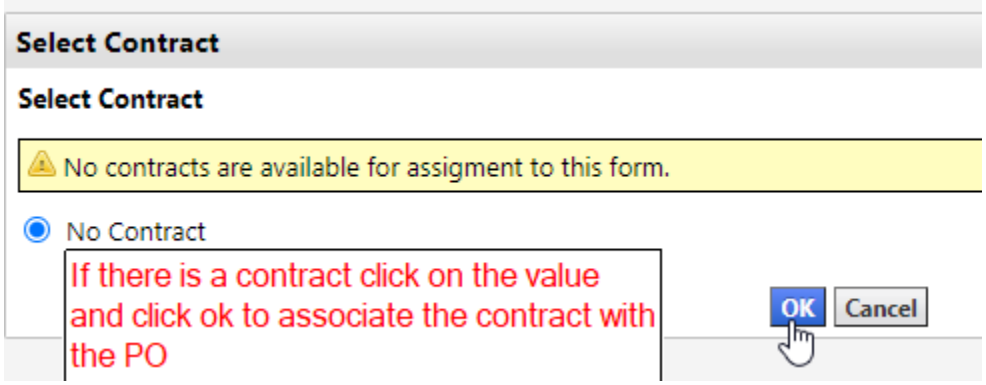
How To Use Contract Tab

- When using a Service Form, users are encouraged to click on the “SELECT CONTRACT” option and find existing contracts from that specific supplier
- These contracts allows the user to obtain special pricing and allows tracking of spend for specific contracts
- *Supplier information will need to be filled out first





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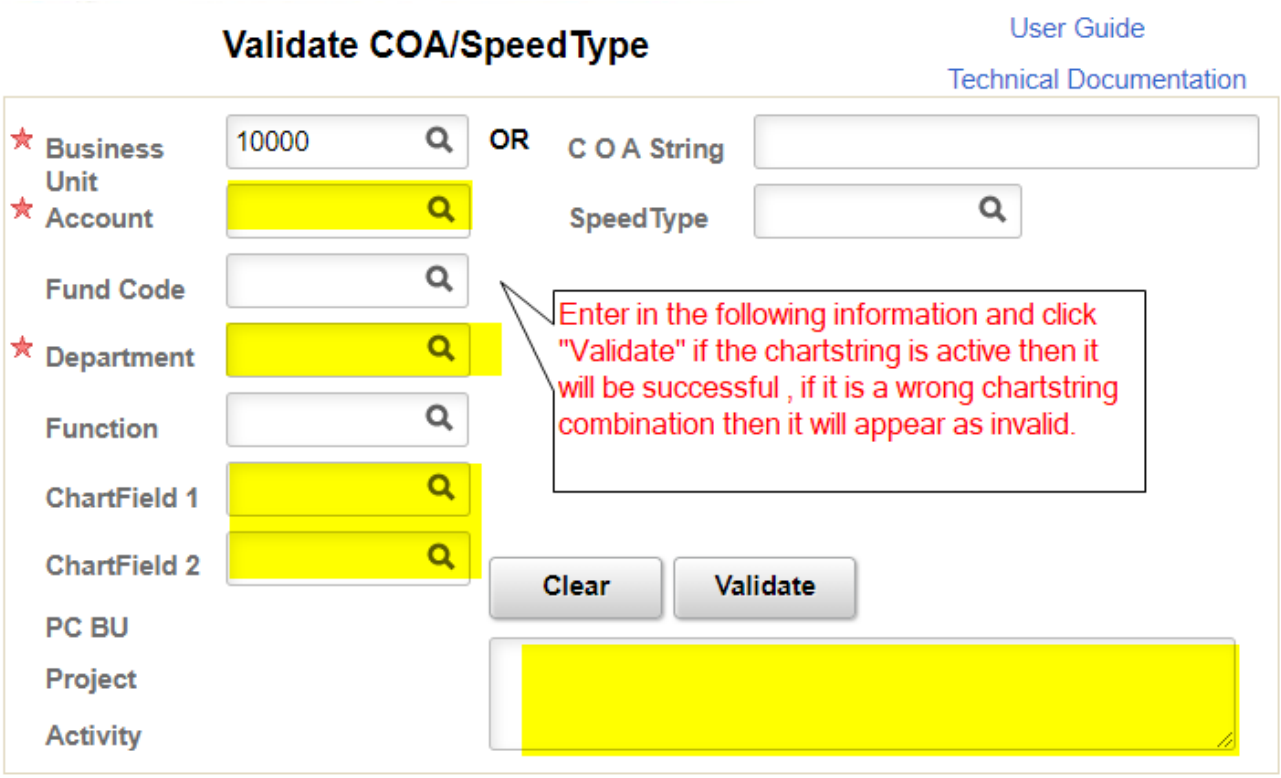
COA Validator and Locating Chartstring

- Chartstrings are often handled by the department finance team. If users have additional questions about what chartstring they should use they can also contact their Regional Purchasing team
- Once a chartstring is obtained users can check the validity by navigating to the Charter of Accounts Validator
  - http://coa.is.berkeley.edu/



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Resources & Support

- BearBUY Website
- BearBUY Help Desk
  - **Contact Information:**
  - Phone: (510) 664-9000 option 1, then option 2
  - Email: bearbuyhelp@berkeley.edu(link sends e-mail) (Link sends email)
    - You can also submit a ticket to https://berkeley.service-now.com/ess/(link is external) after you enter in your CalNet ID and Passphrase.
    - Contacting the BearBUY Help Desk will generate a support ticket which will be routed based on ticket information.
  - For questions related to your Regional Group Purchasing, you can contact your team directly. If you are uncertain about your regional support team and the Regional Support Reorganization, you can learn more on the Regional Services website at: https://regionalservices.berkeley.edu/home(link is external)
  - For questions related to payment of invoices, please email disburse@berkeley.edu(link sends e-mail).
  - For questions related to the purchase of high value goods and services over $10,000, please visit our webpage: Find Your Buyer.

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