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.



ñ	Home: Click on the icon to return to the BearBuy Home/Shop page.	
) III:	Shop: Shopping menu and tasks including shopping page, forms, carts and orders.	
۲	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.	
Ħ	Accounts Payable: Menu for Accounts Payable Dashboard, Invoices and Receipts.	. –

2	Supplier Management: Menu Supplier Management.
6	Menu Search: Keyword search with clickable results.
٩	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.

Train Ap	prover1 🔻 🛛 🚖 🕴 Action Items 🔢 🕴 Notifications ╞ 🙀 0.00 USD 👘	Q,
	Action Items	
	My Assigned Approvals	
Go	Carts Assigned To Me	1
	Requisitions To Approve	1
ontracts chemicals	Invoices To Approve	1
	Unassigned Approvals	
<u> </u>	Unassigned Requisitions Needing Approval	18
BIO	Unassigned Invoices Needing Approval	15
		J

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.

	Orders & Documents		
	Document Search	Approvals	
	Approvals	My Approvals	
	Approvais	Approval Notifications	
ш		My Recent Approvals	

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 <u>Help Desk¹</u> 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).

	Group Results By: List									
			Showing 1 - 14 of 2	14 results		All Dates		Assign	•	Go
1 de	Filtered By	4	Results per page 20	•	Sort by: Sub	mit date newest first	•	🔳 Page 1	1 of 1 膨	?
	Type: Requisition		Hide cart details							
血	Date Range: All Dates		Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Prepared For	Amount	Action	
	Approvals TEST		<i>2</i> 930207 🗟 🖲	Precision Solutions LLC	Not Assigned	2/26/2013 6:54 PM	John Leary	35,000.00 USD	Assign	
1 3	For:		Cart Name	2013-02-26 jleary 02		🔤 Folders 🛛 131 Day	ys in folder [Buyer Catch-All]			
~	Refine Search Results	?	No. of line items	1						
~	Туре		2 874132 🖎	GRAINGER INC	Not Assigned	11/1/2012 2:43 PM	BFS-TRAINING100 TEST	105,000.00 USD	Assign	
	Requisition -		Cart Name	2012-11-01 019999930	19	Folders 249 Day	[Tiered Buyer Appro	oval (Contract) Buyer /	A & B	
	Date Range		No. of line items	1		245 08	Contract EERSO]			

View by Folder²

¹ Help Desk email address is: <u>bearbuyhelp@berkeley.edu</u>

- When no work is pending review/approval for a specific folder, the folder will <u>not</u> 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.

lid	e cart details 🚞 expand all 🛛 📴 collapse all
Þ	G My PR Approvals [3 results]
Þ	📮 Buyer Catch-All [1 result]
P	Buyer Intervention Buyer Intervention AECOI [2 results]
Þ	Buyer Intervention Buyer Intervention EERSO [1 result]
D	Tiered Buyer Approval (Contract) Buyer A & B Contract AECOI [4 results]
þ	Tiered Buyer Approval (Contract) Buyer A & B Contract EERSO [2 results]
Þ	Tiered Buyer Approval (NonContract) Buyer A AECOI [2 results]
þ	Tiered Buyer Approval (NonContract) Buyer B AECOI [1 result]

<u>Filtering</u>

- 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 key and 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.

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

	Custom Fie	lds	T.
	Account		
	BluCard Holde	er	
	Dept Ref No.		
١.	Fabrication Nu	mber	
	Org Node		[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.

Apply Custom Field	Filter			?	X
Org Node	Is Exactly 💌	IMMCB Select from all values	Add another Org Node		
		Save Close			

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:

o Date

• The action you took (approved vs rejected)

Orders & Documents / Approvals / My Recent Approvals V / Outbox

		showing 1 - 20 of	28 results		Previous Year (1/1/2012-12/3)	/2012)		Show requisition details
Filtered By		 Results per page 20 	•	Sor	t by: Approval date newest first	-		* Page 1 * of 2 * ?
Type: Requisition		Cart Number	My Action	Workflow Step	Approval Date/Time	Suppliers	Shopper	Cart Total
Date Range: Previous Year		√ 888893 🕰	Requisition approved	Purch Super (Non-Contract)	11/28/2012 12:24 PM	Bimbo Bakeries USA	Train ReqCreator1	297,000.00 USD
Refine Search Results	?	✓ 888893 A	Requisition approved	Tiered Buyer (Non-Contract)	11/28/2012 12:24 PM	Bimbo Bakeries USA	Train ReqCreator1	297,000.00 USD
Date Range		✓ 888888 R	Requisition approved	Tiered Buyer (Non-Contract)	11/28/2012 12:19 PM	Bimbo Bakeries USA	Train ReqCreator1	99,000.00 USD
Previous Year		✓ 888809 [™]	Requisition approved	Purch Super (Non-Contract)	11/28/2012 11:34 AM	Bimbo Bakeries USA	Train ReqCreator1	297,000.00 USD
My Action		✓ 888809 A	Requisition approved	Tiered Buyer (Non-Contract)	11/28/2012 11:34 AM	Bimbo Bakeries USA	Train ReqCreator1	297,000.00 USD
Approved (28)		✓ 888770 B	Requisition approved	Purch Super (Non-Contract)	11/28/2012 11:27 AM	Bimbo Bakeries USA	Train ReqCreator1	297,000.00 USD
Workflow Step	Te	✓ 888770 A	Requisition approved	Tiered Buyer (Non-Contract)	11/28/2012 11:27 AM	Bimbo Bakeries USA	Train ReqCreator1	297,000.00 USD
Tiered Buyer (Non-Contract) (18) Purch Super (Non-Contract) (8)		✓ 888589 B	Requisition approved	Purch Super (Non-Contract)	11/28/2012 10:13 AM	Bimbo Bakeries USA	Train ReqCreator1	297,000.00 USD
Buyer Intervention (2)		✓ 888589 A	Requisition approved	Tiered Buyer (Non-Contract)	11/28/2012 10:12 AM	Bimbo Bakeries USA	Train ReqCreator1	297,000.00 USD
Workflow Status	- 74	@ 767954 🔍 🛙	Requisition approved	Buyer Intervention	5/21/2012 4:18 PM	Royal Cable Corp, Inc.	Train Shopper 17	750.00 USD
Completed (27) Pending (1)		✓ 770809 🔍 🖞	Requisition approved	Buyer Intervention	5/16/2012 2:40 PM	Royal Cable Corp, Inc.	Train Shopper 04	750.00 USD
Form Type	- Ye	√ 741921 🔍 🗷	Requisition approved	Tiered Buyer (Non-Contract)	4/23/2012 5:51 PM	C.A. BRIGGS COMPANY	Train Shopper 07	49,000.00 USD
Services (15)		√ 762021 🔍 🖲	Requisition approved	Tiered Buyer (Non-Contract)	4/23/2012 1:22 PM	C.A. BRIGGS COMPANY	Cindy Creator Training	300,560.00 USD
General Noncatalog (8)		V 719742 🖻	Requisition approved	Tiered Buyer (Non-Contract)	2/15/2012 7:04 PM	Graybar Electric Company	Paul Investigator Training	1,944,648.94 USD
Prepared By	T•	V 717615 🖎	Requisition approved	Tiered Buyer (Non-Contract)	2/13/2012 1:36 PM	C.A. BRIGGS COMPANY	Chuck Creator Training	200,000.00 USD
Bonnie Buyer Training (6)		√ 711627 🔍 🕅	Requisition approved	Tiered Buyer (Non-Contract)	2/2/2012 2:46 PM	C.A. BRIGGS COMPANY	Train Shopper 01	29,995.00 USD
Cindy Creator Training (3) Paul Investigator Training (2)		🗸 708768 🔍 🗄	Requisition approved	Purch Super (Non-Contract)	1/30/2012 11:41 PM	C.A. BRIGGS COMPANY	Bonnie Buyer Training	300,560.00 USD
Chuck Creator Training (2)	(more)	🗸 708768 🖳 🗐	Requisition approved	Tiered Buyer (Non-Contract)	1/30/2012 11:41 PM	C.A. BRIGGS COMPANY	Bonnie Buyer Training	300,560.00 USD
Prepared For	T.	🗸 708749 🔍	Requisition approved	Purch Super (Non-Contract)	1/30/2012 11:09 PM	Graybar Electric Company	Paul Investigator Training	1,944,648.94 USD
Train ReqCreator1 (9)		✓ 708749	Requisition approved	Tiered Buyer (Non-Contract)	1/30/2012 11:09 PM	Graybar Electric Company	Paul Investigator Training	1,944,648.94 USD
Ray Shopper Training (4) Train Shopper 01 (3)		Results per page 20	•					■ Page 1 ■ of 2 ►
Bonnie Buyer Training (2)	[more]							
Product Flags	T •							

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:
 - o Search Documents: Navigate to the document search page
 - **o** View Saved Searches
 - o Download Export Files: Access the searches you've selected to export

	Orders 8	t Documents		
		Document Search	Document Search	
		Approvals	Search Documents	
		Approvais	View Saved Searches	
ш			Download Export Files	

Advanced Document Search

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

earch	All Documents 💌	All Dates	▼ Go
	Enter search terms such as docume	ent numbers, suppliers, and product information.	

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

Workflow	
Current Workflow Step	2

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

Add Cancel					
Current Workflow Step					
🗆 Additional Authorizer 1	🗆 Dept Dollar Range	PR Validation 2	□ Wait for PR Validation 1		
Additional Authorizer 2	EHS Approval	Purch Super (Contract)	Wait for PR Validation 2		
Buyer Catch-All	Employee or Student	Purch Super (Non-Contract)			
Buyer Intervention	Federal Funds Approval	Purch Super - Risk Mgmt Forms			
Change Order Processing	Form Approval Purchasing Supervisory 2				
Chartfield1 (Project)	Mixed Order Auto-Return	Purchasing Supervisory 3			
Chartfield2 (Flex)	Not Open for Ordering				
Commodity Approval	Org Node Approval	Supplier Not Found Auto-Return			
Commodity Notification	PR Creator	System Auto-Return			
Controlled Substances Buyer	PR Export	Tiered Buyer (Contract)			
Create PO	PR Validation 1	Tiered Buyer (Non-Contract)			
	ſ	Add Cancel			

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 Fields			
Account	Is Exactly	Select from all values	Add another Account
BluCard Holder	Is Exactly	Select from all values	Add another BluCard Holder
Dept Ref No.	Is Exactly		Add another Dept Ref No.
Fabrication Number	Is Exactly 💌	Select from all values	Add another Fabrication Number
Org Node	Is Exactly 💌	Select from all values	Add another Org Node
Speedtype	Is Exactly	Select from profile values Select from all values	Add another Speedtype
Chartfield1	Is Exactly	Select from all values	Add another Chartfield1
Chartfield2	Is Exactly	Select from all values	Add another Chartfield2
Department	Is Exactly 💌	Select from all values	Add another Department
Fund	Is Exactly 🔻	Calant from all unline	Add another Fund
		Go	

- 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.

	Showing 1 - 22 d	of 22 results	All Dates			
Filtered By	* Results per page	500 -	Sort by: Best match	•		n Page 1 of 1 (n)
Type: Requisition	Regulation No.	Supplier(s)	Regulsition Name	Requisitioner	Regulation Date/Time	Regulation Tota
Date Type: Submit Date	2 999587 🕰	ARROWHEAD MOUNTAIN SPRING WATER	2013-07-09 CQZ 02	Cindy Zheng	7/9/2013 3:11 PM	100.00 U
(remove all)	2 998445	OFFICE MAX	2013-07-08 susanneshopper 01	susanna chau berkeley UIT - shopper	7/8/2013 12:34 PM	3.46 U
Current Workflow Step	≥ 992613 ^[2]	APPLE COMPUTER INC FISHER SCIENTIFIC VWR INTERNATIONAL INC	2013-06-24 dwhite 01	Dan White	6/24/2013 4/33 PM	2,143.47 U
P Is Eastly: IMMCB	2 985051 2	DELL MARKETING LP	2013-06-12 019999930 01	EFS-TRAINING100 TEST	6/24/2013 1:03 PM	70.39 US
Workflow Status	2 989875	AJANTA RESTAURANT	2013-06-19 019999924 07	BFS-TRAINING106 TEST	6/19/2013 11:22 AM	10,000.00 US
IF Pending	2 989871 2	SUBAWARD-UCSF	2013-06-19 019999924 06	BFS-TRAINING106 TEST	6/19/2013 11:19 AM	250.00 US
Save Search Export Search	≥ 989852 0.	DELL MARKETING UP	2013-06-19 019999924 05	BFS-TRAINING106 TEST	6/19/2013 11:17 AM	100.00 US
	2 989867 🕰	ANDERSON CARPET & LINOLEUM	2013-06-19 019999924 04	BFS-TRAINING106 TEST	6/19/2013 11:14 AM	5,000.00 US
Refine Search Results ?	@ 989861 🔍	DigiKey Corp.	2013-06-19 019999924 02	BFS-TRAINING106 TEST	6/19/2013 11:07 AM	10.00 US
Туре	2 989794	OFFICE MAX	2013-06-19 019999924 01	BFS-TRAINING106 TEST	6/19/2013 11:05 AM	9.67 US
Requisition	2 980820 🔍	OFFICE MAX	2013-06-05 019999930 04	BFS-TRAINING100 TEST	6/5/2013 1:46 PM	21.78 US
Date Range	2 913489 🗟	OFFICE MAX	2013-01-28 019999930 01	Carla Prado	6/5/2013 9:35 AM	48.53 US
All Dates	<i>≥</i> 753336 🗟, 🛙	Comfort Kitchen dba The Mixing Bowl	2012-04-05 019999918 01	BFS-TRAINING112 TEST	6/27/2012 2:58 PM	25,800.00 US
Approved By	2 687827 .	Kekoa Test3	Test - how to hide distribution method on form	w BFS-TRAINING112 TEST	12/16/2011 2:46 PM	10.00 US
BFS-TRAINING101 TEST (1)	a 687826 a	Kekoa Test3	Test - how to hide distribution method on form	n BFS-TRAINING112 TEST	12/16/2011 2:46 PM	10.00 US
Custom Fields Ie	2 664811	Kekoa Test3	Test - how to hide distribution method on form	n BFS-TRAINING112 TEST	12/16/2011 2:44 PM	10.00 US
BluCard Holder	a 679222 A	SPECTRUM CHEMICALS&LABORATORIES PRODUCTS	2011-12-05 019999851 03	BFS-TRAINING317 TEST	12/5/2011 3:20 PM	222,480.00 U
Dept Ref No.	@ 678695	OFFICE MAX	8P 2011-12-05 019999858 01	BFS-TRAINING320 TEST	12/5/2011 9:57 AM	1,798.08 U
Speedtype [more]	@ 678608 D.	OFFICE MAX	8P pr29 12-4-11	BFS-TRAINING320 TEST	12/5/2011 9:04 AM	626.05 U
Form Type %	0 675534 D	NEW VISTA PAYMENT MANAGEMENT	2011-11-29 019999918 01	BFS-TRAINING112 TEST	11/29/2011 8/26 PM	57.00 US
Services (3)	a crum b	BIO-RAD LABORATORIES	2011.11.28.010000867.05	DEC. TO ADAMAGE 11 TECT	11/28/2011 3:57 PM	4 728 00 18

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 Revenue 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.

	IMMCB Searches				
) expand all (-) collapse all	Results per page 20 💌 Total Searches : 1	🛃 Page 1 of 1			
Personal	edit move/copy delete 🗖				
AECOI Searches IMMCB Searches	IMMCB Requsitions at PR Req Creator Step	Add Shortcut Export Go			
Shared		and more, copy factore			
Search All Documents	All Dates	GO			
Search All Documents Enter	All Dates r search terms such as document numbers, suppliers, and product information.	GO			
Search All Documents Enter	All Dates r search terms such as document numbers, suppliers, and product information. to: advanced search my requisitions my purchase orders my vouchers	Go			
Search All Documents Enter	All Dates r search terms such as document numbers, suppliers, and product information. to: advanced search my requisitions my purchase orders my vouchers	Go			

• Another option is to **bookmark** your **Saved Searches** page.



10/31/14

- 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.

101 TEST 🔻 👌	*	Action Items	Notifications 7	Ì	0.00 L	JSD	٩
Bookmarks	-					Alt	+ K
My Bookmarl	ks						
≡ All BearBuy F	Form	S				S	â
= Draft Carts × 🗸					Ê		
≡ My Approvals					ŵ		
≡ Search For Contracts					Ê		
≡ Search Documents Í					Ê		
\equiv View Saved S	Searc	hes					Ê
Site Bookmarks (Read-only) Organization Message							
Done				E	Bookmar	k this	page