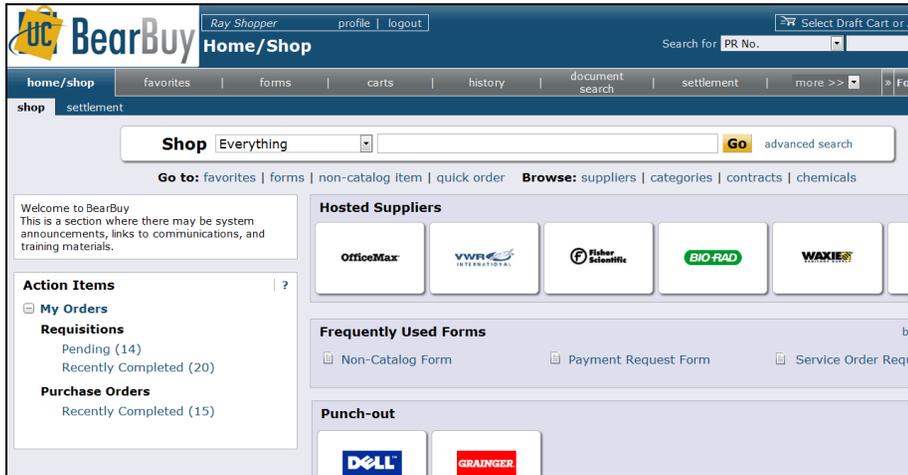


Accessing BearBuy

- ▶ Using **blu**, login and select the **Finance** Tab.
- ▶ On the left side of the **Finance Page**, select **BearBuy**.

Ways to Shop

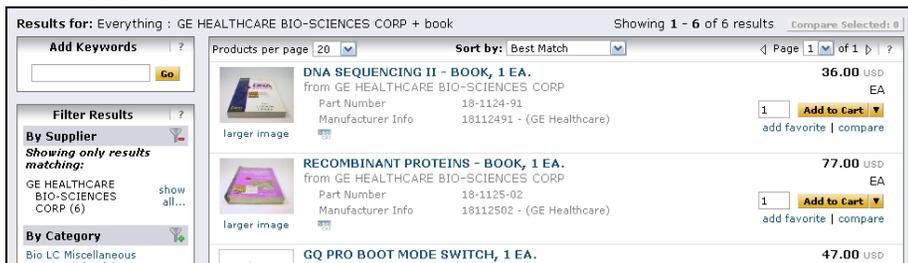
- ▶ This section covers Shopping with a Hosted Catalog, Punchouts and Forms.



Shop with a Hosted Catalog

- ▶ Use **Shop > Everything** to search for hosted catalog items from preferred suppliers at University-specific pricing.
- ▶ Use **Advanced Search** options to enter specific criteria including Product Description, Part Number, Supplier and/or Manufacturer Name and Key Word search.

1. Use **Shop > Everything** to begin Shopping, enter in the applicable search terms, and click the **Go** button.



2. The search results are shown. On the left-hand side are the **Filter Result** options. This lets you filter by **Supplier**, **Manufacturer**, **Unit of Measure** and more.

3. In the search results, the list of items is shown. The Product picture (if any), description and other detailed specifications are typically shown.
4. Use the **compare** link to compare items. Once you have flagged those items to compare, click the **Compare Selected** button.
5. Click the **Add to Cart** button to add desired items to your Cart.
6. While searching, add items to your shopping cart from the search results via the **Add to Cart** button.
7. To access the shopping cart after adding a line item, select the **1 item(s) added, view cart** link or the icon (top right corner of page).
8. To continue shopping click the **BearBuy** logo or **home/shop** tab.

Shop with Punch-outs

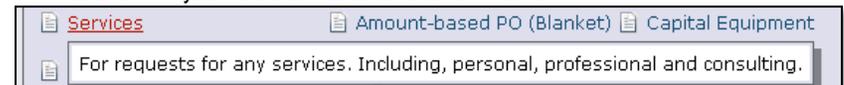
- ▶ **Punch-out** connects to the supplier's website, branded for UCB and using our contract pricing. Punch-out sites retains the look and feel of the regular public website, however, the checkout will result in the products being returned to BearBuy and added to the active shopping cart.
- ▶ Follow the supplier's directions for submitting the items back to BearBuy as each suppliers site may differ. Product pricing and availability may vary between the public and University websites.

1. Click the **supplier's icon**. Select **punch-out** to begin the punch-out session.
2. **Search** in the supplier's catalog for items and **add** to supplier shopping cart.
3. Complete the shopping selected on supplier's site, then return item(s) to BearBuy shopping cart.

Forms

- ▶ Use **Forms** to create shopping carts for non-catalog items, Services, Payment Requests, and several other pre-configured business forms.

1. From the **Forms** section, select the appropriate **form**. A simple description for the form will be shown if you hold the mouse on the form name.



2. **Enter** all required information (indicated in bold on the form).
3. Select **Add and go to Cart** from the drop down menu.
4. Click the **Go** button to return to the shopping cart.

Updating and Editing Shopping Cart Items

1. After adding items to your shopping cart, select the appropriate line by checking line checkbox .
2. Add to **favorites**, **remove items**, or **move items to a different cart** using the list.

About Favorites

- ▶ Add routinely ordered items to a favorites folder for quick re-ordering. Only hosted and form items are eligible to be added as Favorites.

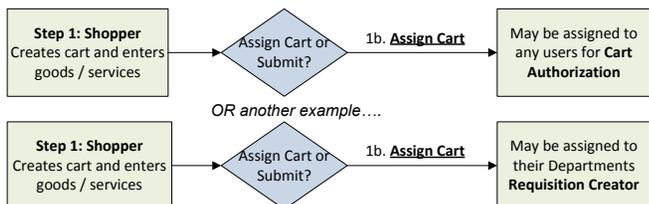


1. **Search** for items. Select the **add favorite** link in the search results.
2. Edit the **Item Nickname** (if needed). The correct product name will display on the requisition and purchase order to the supplier.
3. Select the **Destination Folder** or **New** button and click **Submit**. A message will appear noting the product has been added to the folder.
4. Click the **Close** button.

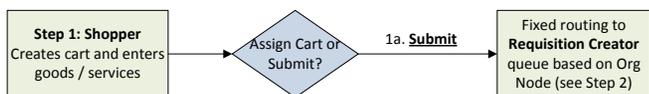
About Assign Cart vs. Submit Cart.

- ▶ The decision to *Assign* or *Submit* a Shopping Cart is based on the needs and business rules in your Department or Unit.
- ▶ **Assign Cart:** When a Shopping Cart is routed to another Shopper (e.g. a programmatic manager, PI, etc) for authorization prior to the creation of the requisition, this Shopper is referred to as the 'Cart Authorizer'. A cart can also be assigned to a Requisition Creator.
- ▶ **Submit Cart:** In this case, Shoppers must know Org Node. The Cart is sent to a Requisition Creators worklist based on the Org Node. Once the Requisition Creator has completed the requisition, it will continue in the approval flow.

ASSIGN CART = "Shopper assigns to a single individual – "One to One"



SUBMIT = "User Submits to Requisition Creator(s) Worklist – "One to Many"



Assign Shopping Cart Method

1. Click the **Assign Cart** button and select the desired Cart Authorizer or Requisition Creator.
2. You can also enter a **comment** for the Cart Authorizer if needed.
3. Click the **Assign** button, and BearBuy sends an email notification of the assigned shopping cart to the authorizer.

Submit Shopping Cart Method

1. Click the **View Cart Details** button.
2. On the **Summary** tab, scroll down to the **Org Node** section. Select from a Profile Value or search and select from all Berkeley Org Nodes.
3. Once the Org Node is selected, click the **Submit** button when the Cart is ready.

Unassigning Shopping Carts

- ▶ Assigned carts can be unassigned if you need to make changes to the shopping cart or if you need to change the Requisition Creator. Submitted Carts cannot be Unassigned.
1. Click **carts** ⇒ **draft carts** on the navigation bar.
 2. Go to **My Drafts Assigned to Others** section and locate the requisition.
 3. Click the **Unassign** button. The cart will be returned to your **Draft Carts** list.

Withdrawing Requisitions

- ▶ Pending requisitions can be withdrawn from approval workflow. Assigned Carts cannot be Withdrawn.
1. Find the Requisition, typically by going to **carts** ⇒ **my requisitions** on the navigation bar.
 2. Click **PR Approvals** tab to view the requisition's status in approval workflow.
 3. From the Available Actions drop-down menu select **Withdraw Entire Requisition**.
 4. Click the **Go** button. Enter the **reason** for withdrawal.
 5. Click the **Withdraw Entire Requisition** button.

Reviewing Action Items

- ▶ On the left side of the **BearBuy** homepage, you can review the **Action Items** section for Requisition status updates such as Pending and Recently Completed.



Status of your Cart

- ▶ Before the Cart becomes a Requisition, you can see the status of any Carts you have assigned to your Requisition Creator under the Navigation bar, **Carts > Draft Carts**.
- ▶ Once the Requisition Creator has finalized his or her edits to the Cart, it will no longer be shown here. Completed carts are a Requisition, and are shown under **Carts > my requisitions**.

Requisition and Purchase Order History

- ▶ All requisitions and purchase orders are permanently stored within **BearBuy**.
1. Select **history/reports** on the navigation bar to search for requisitions, purchase orders, invoices or vouchers.
 2. Select the appropriate tab: **PO history** | **requisition history** | **my requisitions**, etc.
 3. Click the Requisition No., PO No/ or Invoice/Voucher No. to view document summary, detail, and approval history.
 4. You can also filter by **Custom Fields** appropriate for the document, such as **Org Node** or **Accounting Codes** such as **SpeedType**, **Fund**, **Dept**, or **Chartfield 1 / 2**, among others.