



## **19.3 New Feature Review**

### **November 2019**

# Enhancements in this Release

- Documents and Approvals Menu Changes
- Searching Receipts
- Browser requirements for accessing BearBuy

# Reminder: BearBuy Unavailable

**BearBuy will be unavailable Friday, November 8<sup>th</sup> at 6PM through Sunday, November 10<sup>th</sup> at 9AM to upgrade from release version 19.2 to 19.3.**

- BearBuy will be available on Monday, November 11th

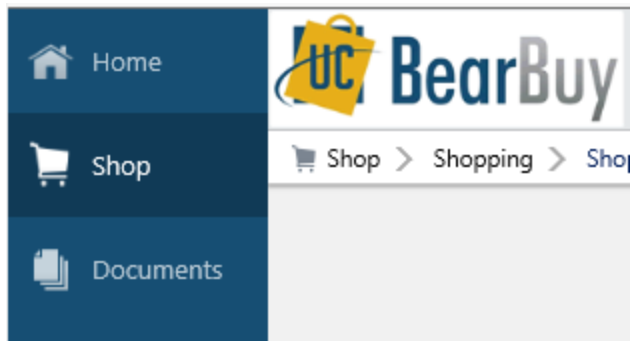
## **What to expect during the outage:**

- BearBuy will not be available
- Please complete all BearBuy requests prior to the outage

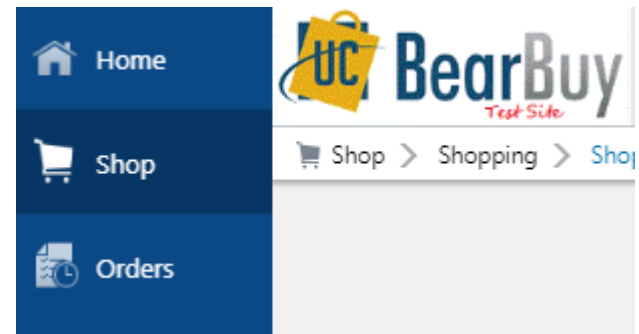
# Documents Menu Changes

Previously, in the side bar menu there was an option for Documents that was used to navigate to Document Search. The Documents menu option has been updated to Orders along with a new icon.

Before 19.3:



After 19.3:

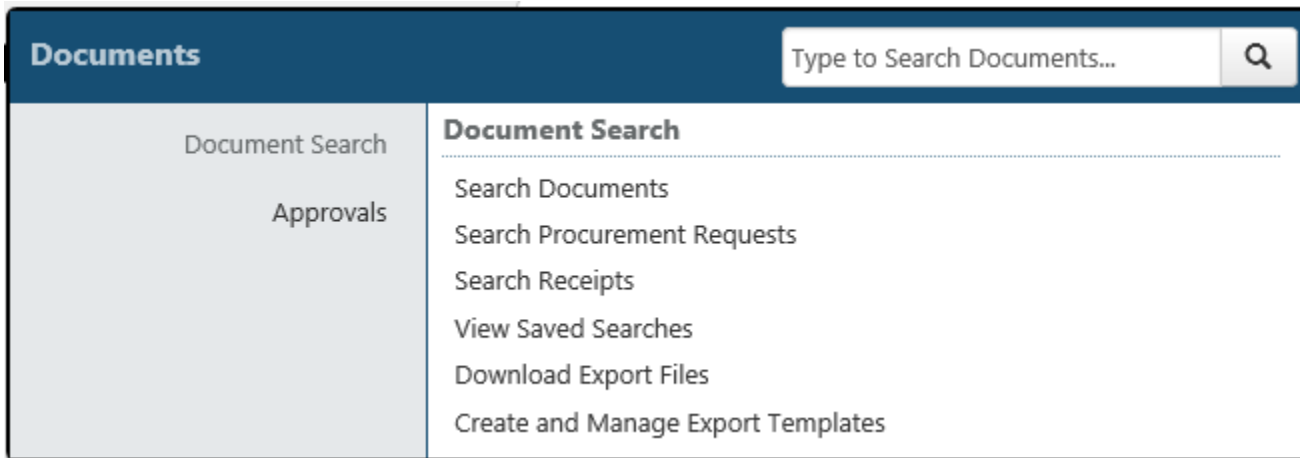


The Documents icon has been updated and will be renamed to Orders.

# Documents to Orders Menu Changes

The new Orders menu options have been updated with 19.3 to include Search in place of Document Search.

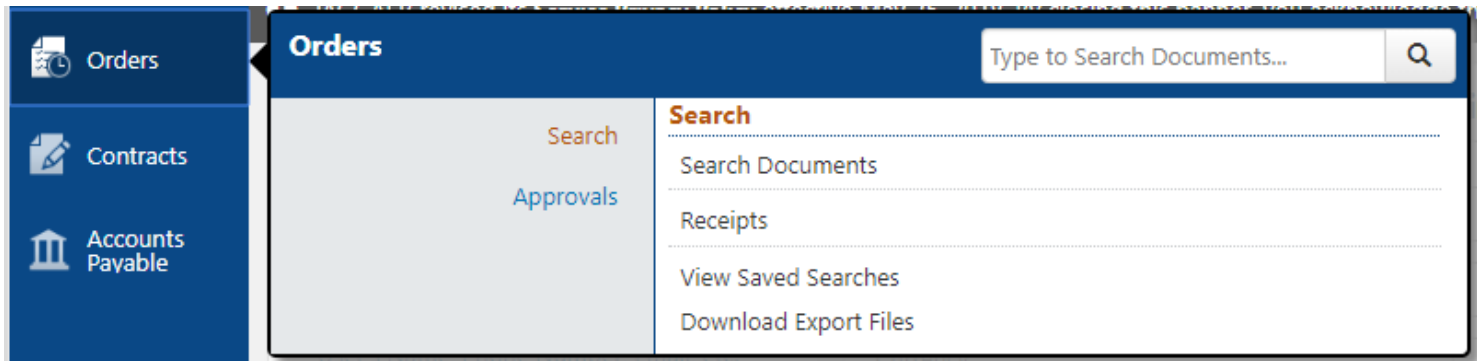
Before 19.3:



# Documents to Orders Menu Changes

The new Orders menu options have been updated with 19.3 to include Search in place of Document Search.

After 19.3:

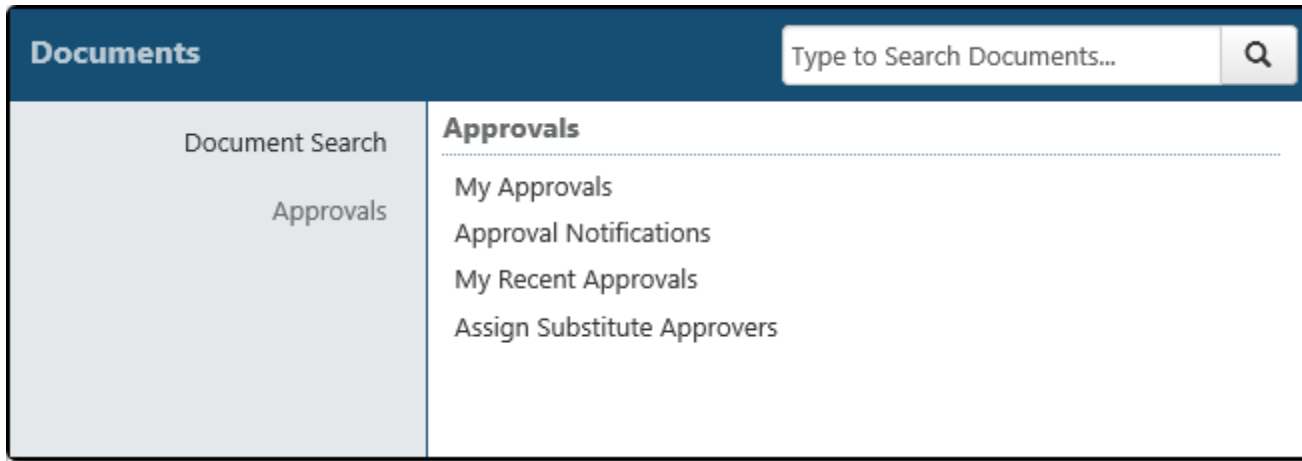


To navigate to Document Search the new path will be Orders > Search > Search Documents.

# Approval Menu Changes

The Approvals sub-menu options under the Orders icon have been updated with 19.3.

Before 19.3:

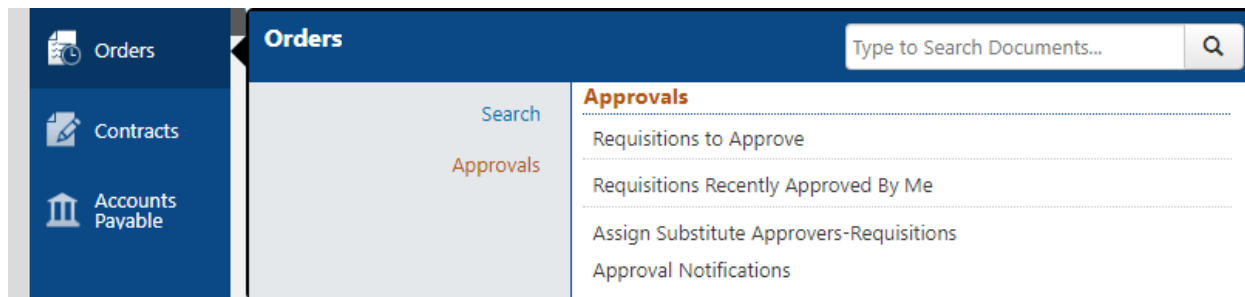


# Approval Menu Changes

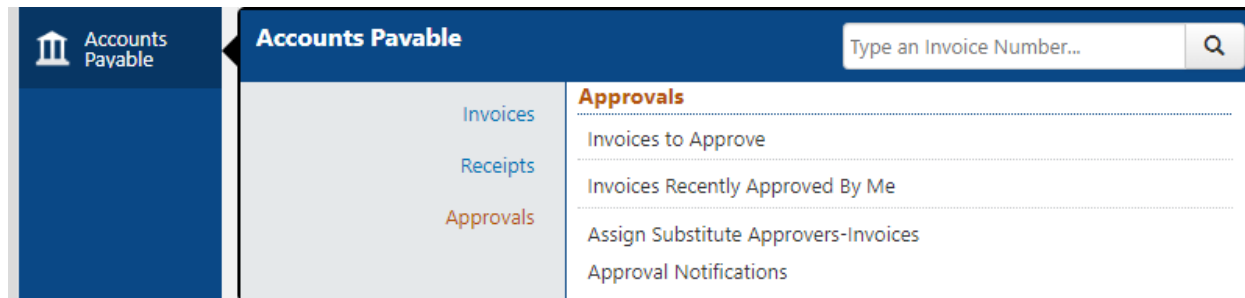
The Approvals sub-menu options have been updated with 19.3 to include options for specific documents to approve depending on what roles you have in BearBuy.

After 19.3:

Requisition Approval: Orders > Approvals



Voucher Approval: Accounts Payable > Approvals

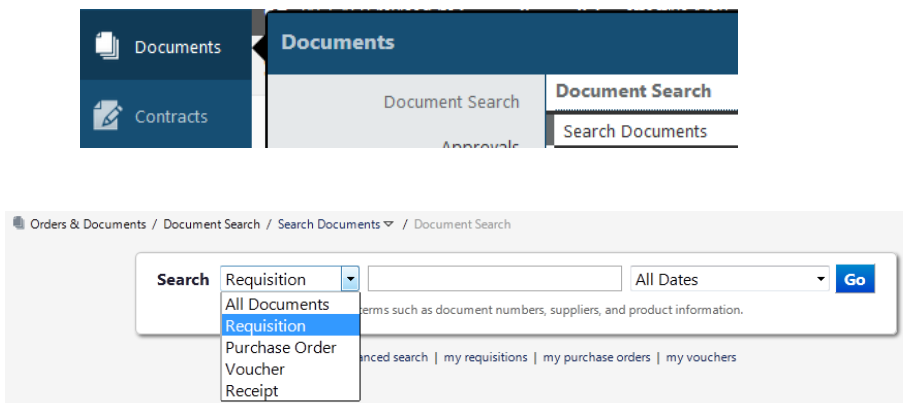




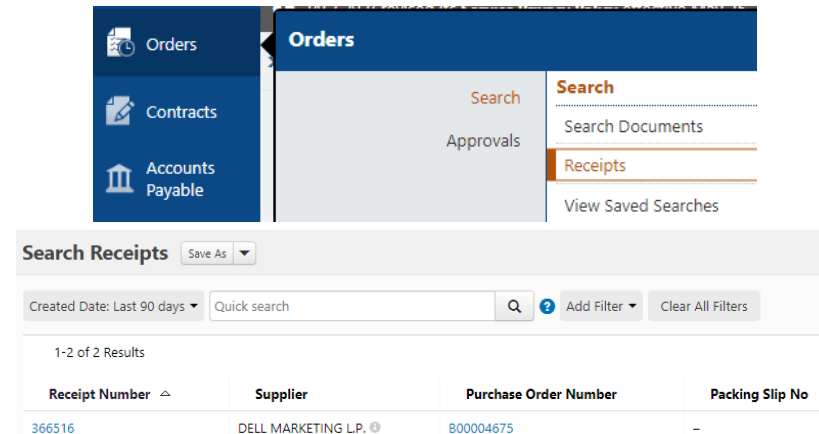
# Search for Receipts

- The look and feel for receipt search has changed
- Previously, receipts were found in the Documents menu under Search Documents
  - You had to enter search criteria before beginning your search for receipts
- Now, receipts search is under the new **Orders** menu with a search option under **Search** called **Receipts**
  - The search page for receipts is laid out differently with results automatically displayed and you use filters to refine your search results on the results page

Before 19.3:

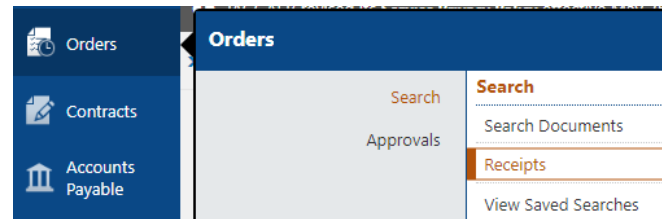


After 19.3:

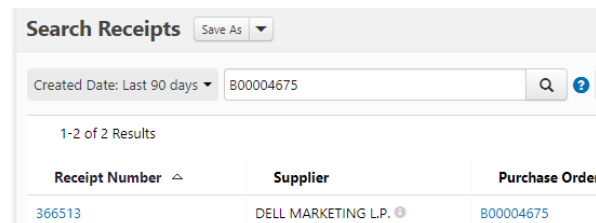


# Using Receipt Search

- Navigate to the Receipt page, through the menu under **Orders** → **Search** → **Receipt**

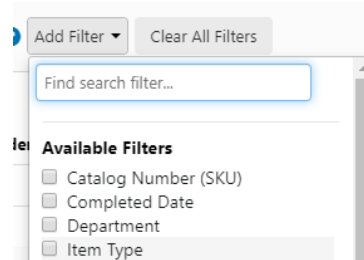


- The search screen displays a list of all relevant receipts on the page
- You have two options to narrow your search using the filter options
  - **Option 1: Perform a Quick Search** - You can perform a quick search of the documents by entering a value in the field and clicking the **magnifying glass** icon. Matching documents are returned in the search results below the search box.

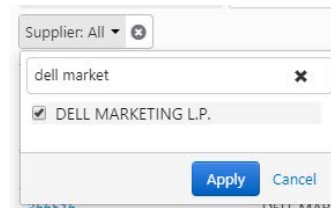


# Using Receipt Search

- **Option 2: Add Filters for an Advanced Search** - Use the filter options to perform a more specific search.
  - Click the **Add Filter** button. A list of available filters displays.



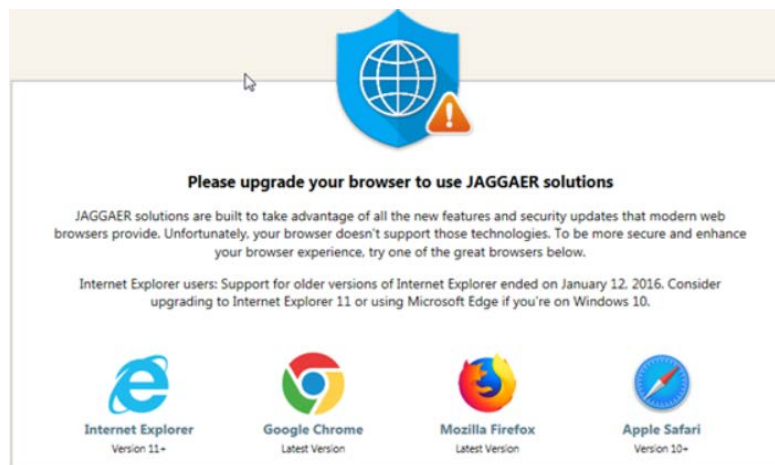
- Click the **checkbox** for the appropriate filter in the list. Search options display. For example, if you choose Supplier, an overlay displays where you can select the appropriate supplier.
  - When there are many options, such as in the supplier example, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in Suggested list, enter a value in the search field.
- When you have made the appropriate selections to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. Click the **x** to remove the filter.



- Repeat the steps above to add additional filters.

# Browser Requirements for accessing BearBuy



- BearBuy is **only** supported on the following browsers and versions:
  - Internet Explorer (IE) 11
  - Firefox - latest version
  - Chrome - latest version
  - Safari - latest version
- BearBuy will no longer be accessible using Internet Explorer (IE) 6-10.
  - If IE 6-10 is used to access BearBuy, the following message will appear
  - Use a supported browser listed above to access BearBuy



# Resources

- **BearBuy training materials:** <https://supplychain.ucsf.edu/bearbuy-training>
- **BearBuy Systems Requirements** (including compatible browsers): <https://supplychain.ucsf.edu/bearbuy-training#System%20Requirements>

## Additional Questions

- For  **BearBuy** technical support, how-to questions, contact the IT Service Desk (415) 514-4100, option 2 or [appsupport@ucsf.edu](mailto:appsupport@ucsf.edu)
- For  **BearBuy** lien and policy questions, e-mail [Buy@ucsf.edu](mailto:Buy@ucsf.edu)



**Thank you!**