








## What do all the BearBuy Icons Represent?

- ▶ Use this guide to learn about what various icons mean in BearBuy.
- ▶ The definition of many icons can be determined by hovering over the icon in BearBuy.



### Navigation

- ▶ BearBuy has icon based navigation menus that represent various BearBuy pages and activities.

 Home	<b>Home</b> – Clicking on the icon will direct you back to your BearBuy Home page.
 Shop	<b>Shop</b> – Menu containing shopping tasks including catalog quick search, access to the shopping page, forms, favorites and access to draft carts and orders.
 Orders	<b>Orders</b> – Menu containing document search options and requisitions pending your approval.
 Contracts	<b>Contracts</b> – Menu containing a search page for BearBuy contracts.
 Accounts Payable	<b>Accounts Payable</b> – Menu containing tasks related to invoices and receipts, including vouchers pending your approval.
 Menu Search	<b>Menu Search</b> - Keyword search that returns a list of BearBuy pages containing that keyword. Used when you are unsure of the location of a specific menu.
All ▾ Search (Alt+Q)	<b>Quick Search</b> - Allows a variety of searches on documents that can be performed from anywhere in BearBuy.
	<b>Dropdown Menu</b> – Indicates a dropdown menu of options is available such as at the top navigation menu.








### Action Items & Notifications

- ▶ Action Items and Notifications are now represented by a flag and bell icon.

	<b>Action Items</b> – Displays items requiring your action.
	<b>Notifications</b> – Lists your recent notifications.






### Bookmarks

- ▶ Bookmarks can be configured for quick access to commonly used pages.

	<b>My Bookmarks</b> – Click the icon from the top navigation menu to expand list of shortcuts to frequently used BearBuy pages set by the user.
	<b>Re-order Bookmark</b> – Hovering over this icon allows you to change the order of any saved bookmarks.
	<b>Edit Bookmark Name</b> – Allows you to edit the name of a bookmark.
	<b>Save Bookmark Name Edits</b> – Saves a bookmark name edit.
	<b>Cancel Bookmark Name Edit</b> – Cancels any unsaved edits made to a bookmark name.
	<b>Restore Bookmark Name</b> – Restores the default name of an edited bookmark.
	<b>Delete Bookmark</b> - Removes a saved bookmark.






### Shopping Homepage Icons

- ▶ The Shopping Homepage is the main page to shop using catalogs, Punch-outs, and forms.

	<b>Punch-out</b> – Symbol found in the upper right corner of a supplier icon on the Shopping Homepage indicating the supplier is a Punch-out (suppliers that have their own sites for shopping and are accessible from BearBuy).
	<b>Form</b> – Symbol in the upper right corner of an icon on the Shopping Homepage indicating a form.
	<b>Form Information</b> – Symbol found when hovering over a form. Click the icon for a description of the form.
	<b>Expanded Section</b> – This down arrow is found next to the section headings of groups of suppliers or forms on the Shopping Homepage. Click the arrow to expand the section.
	<b>Collapsed Section</b> – This right arrow is found next to the section headings of groups of suppliers or forms on the Shopping Homepage. Click the arrow to collapse the section.




## Shopping, Search, & Favorites Icons

- When searching for catalog items or documents, there are options available to users to refine search results, retrieve additional information, or save items and searches for future use.

	<b>Favorite</b> – Items and forms designated as a personal favorite. Favorite items are identified with this icon in product search results.
	<b>Add Filter</b> – Click on the icon to select multiple filters from each filter section to refine search results.
	<b>Remove Selected Filter</b> – Click on the icon to edit or remove selected filters from each filter section to expand search results.
	<b>Has Attachments</b> – This paperclip icon appears next to the document number in the Document Search results page to indicate there are attachments or links associated with the document. Clicking on the icon will open the document's attachments tab displaying a listing of all the attachments. The icon is available for requisitions, purchase orders and vouchers that have attachments.
	<b>Check Availability</b> – Click the icon to check the product availability of an item. This icon is displayed next to the product description when comparing catalog items if the supplier supports this functionality.



## Line Item Icons

- Line items on orders can originate from the catalog, a Punch-out catalog, or a form.

	<b>Form</b> – Indicates that an item is a form. The icon appears next to a line item on an order that was created using a form. Click on the icon to view the form.
	<b>Punch-out</b> – Indicates the item is a Punch-out, which is a catalog that is hosted and maintained by the supplier. When next to a line item on an order, this indicates that the item was retrieved from a Punch-out catalog.
	<b>Catalog Graphic</b> – An image of the catalog item is available. Click on the item to see the details and image.









## Cart Icons

- A shopping cart holds items that you have shopped for and would like to purchase.



	<b>Active Cart</b> – Appears at the top of BearBuy to indicate the cart you are currently working on.
	<b>Active Cart</b> – Appears on your Drafts Carts or Assigned Carts page to indicate your active cart, i.e., the cart you are currently working on.

## Product Flag Icons

- Used to identify that a product has certain attributes.
- The icons can appear:
  - On catalog items
  - On forms
  - As filters to narrow down catalog searches
  - In Document Search, used as search criteria to find orders containing items with these attributes



	<b>Controlled Substances</b> – Products that are addictive drugs or can be used in manufacturing addictive drugs. Such products are regulated under CSA and are maintained by FDA and USDOJ. Federal regulations have been set for identification, handling and usage of such products. This can identify products that are classified into one of the defined schedules or lists.
	<b>Energy Star</b> – Products certified with the Energy Star qualification per the Environmental Protection Agency and Department of Energy jointly run program. For more information visit: <a href="http://www.energystar.gov/">http://www.energystar.gov/</a> .
	<b>Green</b> – A product is indicated as 'Green' according to the green purchasing definition of NAEP (see definition at <a href="http://www.NAEPnet.org">www.NAEPnet.org</a> ). Generally, a Green product or service is one that is both environmentally and socially responsible. The product is accountable to and respectful of the places and people that provide and use them.
	<b>Hazardous Materials</b> – Products designated as a hazardous material. OSHA has set regulations to identify specific health and physical hazards associated with these substances.
	<b>Radioactive Materials</b> – Any radioactive product whose radioactivity is high enough such that its usage is governed by NRC regulations.
	<b>Radioactive Minor</b> – Any radioactive product whose radioactivity is below background radiation levels and so a user does not need a specific license from NRC for its usage.
	<b>Select Agent</b> – Live cells of extremely hazardous pathogens. Select agents are materials found on the list maintained by the CDC for monitoring the use of specific pathogens. The list can be found at: <a href="https://www.selectagents.gov/selectagentsandtoxinslist.html">https://www.selectagents.gov/selectagentsandtoxinslist.html</a>
	<b>Toxin</b> – Products that are toxic to various biological processes and are used to study specific cell processes such as the signal transduction mechanism.

## Forms Icons

	<b>Calendar</b> – Click on the icon to choose a date for a field.
	<b>Forms "Help Text"</b> – Click on the question mark to access additional help and guidance for a particular section on a form.









## Checkout Icons

- During checkout, a progress bar across the top of the page shows all the checkout steps that require information before the Requisition can be submitted. Examples include Accounting Codes or Shipping Address.
- There are corresponding icons next to a checkout step to indicate completed steps and steps that are missing information.

	<b>Checkout Step is Complete</b> – Indicates that the information required in a checkout step (e.g., Shipping Information) has been provided or the checkout step is optional.
	<b>Checkout Step needs Attention</b> – Indicates that information is missing in a checkout step (e.g., Shipping Information) and needs to be provided before the order can be placed. Click on the step containing this icon to navigate to the area and provide the required information.








## Workflow Step Icons

- Workflow steps for documents can be seen in the **PR Approvals** tab on a Requisition, the **PO Approvals** tab on a Purchase Order, and the **Approvals** tab on a Voucher.
- Each step in the workflow is represented by a box containing text and icons to indicate the status of the workflow step.

	<b>Workflow Submitted</b> – Indicates the beginning of the document workflow.
	<b>Future Workflow Step</b> – Indicates a step that will occur in the future.
	<b>Active Workflow Step</b> – Indicates that the workflow step is pending and has to be completed.
	<b>Approved Workflow Step</b> – Indicates a step that has been completed or approved.
	<b>Rejected Workflow Step</b> – Indicates a step where the rejection of the document occurred.
	<b>Partially Approved/Partially Rejected</b> – Indicates a step where the partial approval/partial rejection of items in the document occurred.
	<b>PO Step</b> – Indicates a Purchase Order step such as Purchase Order creation or Purchase Order distribution.
	<b>Workflow Finished</b> – Indicates that all required workflow steps in the workflow process has been completed.

## Document Workflow Status Icons

- Workflow statuses indicate the current state of a document or the status of an item on a document.

	<b>Pending</b> – A document or item that is currently awaiting action in the approval process. A pending document or item requires further action before moving to the next step.
	<b>Approved</b> – All workflow or approval routing is complete for this document or item on a document. No further approval action is required.
	<b>Rejected</b> – The entire document or an item on the document has been rejected (or not approved) based on reasons stored on the Requisition History tab. Once a document is in Rejected status, it cannot return to an active status.
	<b>Partially Rejected</b> – A Requisition contains both line items that were approved and rejected.
	<b>Withdrawn</b> – Requisitions that have been completely withdrawn from the Requisition approval queue. Withdrawn Requisitions cannot be edited and returned to an active status, but they can be copied to a new cart.
	<b>Resubmitted Requisition</b> – A Requisition was submitted and then returned to the Requester by an approver. The Requester then resubmitted the Requisition into workflow.
	<b>Canceled</b> – Indicates a canceled line on a Purchase Order. Refer to the PO History tab for details. A supplier cancellation will be noted in the audit trail as the System user.









## Approvals List Icons

- Icons that appear for approval folders.

	<b>Collapsed Approval Folder</b> – Appears next to a shared approval folder that is collapsed and is not displaying the list of pending documents within the folder.
	<b>Expanded Approval Folder</b> – Appears next to a shared approval folder that is expanded to display the list of pending documents within the folder.
	<b>Substituting for another Approver</b> – Indicates that the approval folder belongs to another approver. The approver has designated you to be a substitute approver in their absence.
	<b>Substitute Approver Designated</b> – Indicates that you designated another approver to approve of requisitions in your approval folder on your behalf.
	<b>Future Scheduled Approval Substitute</b> – Appears on the Assign Substitute Approvers page. Indicates that an approval folder scheduled substitution is scheduled. This is typically next to the scheduled substitution date and time.
	<b>Active Approval Substitution</b> – Appears on the Assign Substitute Approvers page. Indicates that an approval folder scheduled substitution is pending. This is typically next to the scheduled substitution date and time.



## Warnings, Information, & Help Icons

- ▶ Distinct icons direct attention to important messages.
- ▶ Carefully review any warnings that may follow these icons.
- ▶ If you need help, click on question marks on the BearBuy page for guidance.

	<p><b>Not Open for Ordering</b> – A <b>STOP SIGN</b> next to a supplier name indicates the supplier is not accepting purchase orders. If you use these suppliers to place an order, BearBuy will return the entire Requisition to your draft carts. If you believe this supplier accepts POs, contact Customer Support at (415) 514-4100, option 2.</p> <p>You <b>CAN</b> use a supplier with a stop sign on the <b>Payment Request</b> form or Meeting &amp; Entertainment Payment Request form.</p>
	<p><b>Warning Icon</b> – Indicates important information on forms. Carefully read and follow all information that follows the warning sign. For example, this sign is found on forms warning users to not mix forms used for internal requests (e.g., Change Order Request form) with forms used for ordering (e.g., Non-Catalog form).</p>
	<p><b>Requires Attention Warning</b> – Indicates an area that needs your attention. For example, this can appear next to backordered or canceled items on a Purchase Order or can indicate that a Purchase Order is over-invoiced.</p>
	<p><b>Error</b> – Indicates that an error occurred or required information is missing, such as on a form.</p>
	<p><b>Punch-out Unavailable</b> – The Punch-out site may not be available. The supplier may be experiencing technical difficulties with the site or the supplier is performing maintenance on the site usually after standard business hours.</p>
	<p><b>Punch-out Slow</b> – The Punch-out site may not be running slowly. The supplier may be experiencing technical difficulties with the site. The site may be accessible, but is not performing optimally and pages on the site may be slow to load.</p>
	<p><b>Inline Help</b> – Precedes a <b>Help</b> link such as in the shopping cart. Click on the icon or Help Link to view guidance on a BearBuy page.</p>
	<p><b>Help</b> – Click on the question mark to access guidance available on various BearBuy pages such as Document Search, My Approvals list, Action Items box, etc.</p>



## Matching Icons

- ▶ BearBuy has two-way matching between the Purchase Order and the voucher (invoice).
- ▶ Matching of documents is displayed on the **Matching** tab of a voucher.

	<b>Matched</b> – Documents are matched.
	<b>Unmatched</b> – Documents are not matched.





## Check and X Icons

- ▶ These icons denote whether an item is selected or not in various areas of BearBuy.

	<b>Yes</b> – An item is selected or approved. These include items checked on a form, requisition, Purchase Order, or in a profile.
	<b>No</b> – An item is not selected. These include items not checked on a form, requisition, or in a profile.




## Preview, Print, Link, & Export Icons

- ▶ Print BearBuy pages, get a preview of documents, or access links to resources outside of BearBuy. Search results can also be exported as well.

	<b>Preview</b> – Click the icon to view a preview of the document.
	<b>Print</b> – Click the icon to print the page containing this icon. If a printer friendly version of the page is available, that will appear when clicking this icon.
	<b>External Link</b> – Indicates there is a link to a page outside of BearBuy. This can appear on a voucher to indicate a link to a scanned invoice image, a link to Supplier's External Website from a catalog search, or a link to a website that was added to a form.
	<b>Recurring Export</b> – Indicates that a saved Document Search is a recurring export that automatically runs on a set schedule.

## Supplier Type Icons in a Supplier Search

- Suppliers or catalogs available in BearBuy can be searched using the [Browse: Suppliers](#) link on the BearBuy Homepage (under the product search bar) or through a form.
- Icons in the search results indicate the type of each supplier.

	<b>Hosted Catalog Supplier</b> – Indicates supplier has a hosted catalog. This icon appears next to the supplier name in the <a href="#">Browse: Suppliers</a> search and when searching for a supplier on a form.
	<b>Punch-out</b> – Indicates the item is a Punch-out, which is a catalog that is hosted and maintained by the supplier. When next to a supplier in the <a href="#">Browse: Suppliers</a> , this indicates that the supplier has a Punch-out catalog.
	<b>Non-Catalog Supplier</b> – Indicates a non-catalog supplier. This icon appears next to a non-catalog supplier listing in the <a href="#">Browse: Suppliers</a> search.

## Category Icons

- These icons represent the various categories of items available in the system.
- The icons appear when using the [Browse: Categories](#) search function on the BearBuy Homepage (under the product search bar), which provides a quick way to locate all items across all suppliers in a certain category.

	<b>Lab Supplies</b> – Products used in various research environments.
	<b>Office</b> – Office supplies and consumables
	<b>MRO/Facilities</b> – Products related to maintenance repair and operations (e.g., facility management).
	<b>Furniture</b> – Different types of furniture products.
	<b>Services</b> – Service-related requests.
	<b>Manufacturing/Engineering</b> – Major equipment purchase.
	<b>Books and Publications</b> – Hardcopy documentation spanning all topics and interests.
	<b>Electronics/IT/AV</b> – Electronic or computer-related equipment
	<b>Specialty</b> – Miscellaneous specialized products
	<b>Food/Food Equipment</b> – Food-related items.
	<b>Medical / Clinical Supplies</b> – Medical, surgical, clinical, and dental products.

## Supplier Class Icons

- Used to identify:
  - Preferred suppliers
  - Type of supplier
  - Suppliers with special classifications
- The icons appear when searching for a supplier from the:
  - [Enter Supplier](#) field on a form
  - [Supplier](#) field in Document Search
  - [Browse: Suppliers](#) link on the BearBuy homepage
- The icons also appear next to the supplier name in shopping carts, requisitions, and Purchase Orders.
- These supplier classes are available as filters to refine catalog search results.
- A supplier can have multiple supplier classes.

	<b>Ability One</b>
	<b>Disabled Veteran Business Enterprise or Service Disabled Veteran Owned Small Business</b>
	<b>Disadvantaged Business Enterprise</b>
	<b>Historically Black College and University Minority</b>
	<b>HUBZone</b>
	<b>Minority Business Enterprise</b>
	<b>SDB (8a) Program</b>
	<b>Small Business</b>
	<b>Small Disadvantaged Business</b>
	<b>Veteran Business Enterprise or Veteran Owned Small Business</b>
	<b>Women Business Enterprise</b>
	<b>Women Owned Small Business</b>
	<b>UCSF Internal Store</b> – A group within UCSF that supplies goods or services. These are preferred suppliers in BearBuy.
	<b>Preferred Category</b> – A preferred supplier in a product category.
	<b>Science Catalog Supplier</b> – Supplier that offers a catalog containing scientific goods.