Navigating BearBuy - Quick Reference

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1. **UC BearBuy Logo**
   Click the logo to navigate back to your homepage from anywhere in BearBuy.

2. **User Information**
   Displays your name, a link to your profile, a link to set your homepage, and the logout link. Includes links to recently completed/approved requisitions that you own.

3. **My Bookmarks**
   List of shortcuts to frequently used BearBuy pages that you can set. Also contains a default link to BearBuy News (Organization Message).

4. **Action Items**
   Displays items requiring your action. Items listed in this menu vary depending on your role. Shoppers and Requesters will see carts assigned to them, and Approvers will see documents requiring their approval.

5. **Notifications**
   Lists your recent notifications. The quantity and type of notifications depends on the email preferences that you have set up in your user profile.
6. Cart Summary

Displays the total $ amount in the current cart. Clicking on the cart will display a pop-up summary (item description, price, quantity, and picture if available). Items can also be deleted by clicking on the garbage can icon. Click the "View My Cart" button to go directly to the cart page where you can view and edit item details. Click the "Checkout" button to begin proceeding to checkout.

7. Quick Search

Search for documents in BearBuy. Click in the box and the Quick Search box expands. Select the type of document to search for in the dropdown menu, type in the document number, and click the magnifying glass icon (or press your keyboard's enter key) to start the search.

8. Quick Menu

Displays at the top left corner of pages. Indicates where in the current page is located in the navigation menu. Triangles indicate a submenu.
9. Navigation Menu

Click on these icons to open links to pages that have been grouped into categories of similar activities:

1. **Home** – Directs you back to your BearBuy Homepage.

2. **Shop** – Menu containing shopping pages, draft carts, and orders.

   a. **Shopping** – pages related to shopping activities.
      - **Search bar** – find a product using keywords or catalog number.
      - **Shopping Home** – access the main shopping page.
      - **Advanced Search** – Catalog search with fields for specifying additional criteria.
      - **View Favorites** – create and define shared and personal favorites folders and items. Items can be moved and copied between folders; current folders and items can be edited and removed. Note: Favorite items can be also be added through search results and the checkout screens.
      - **View Forms** – access a full list of BearBuy Forms to order non-catalog goods/services and create internal requests for payment and change orders.
      - **Browse By** – browse items by suppliers, items by categories, contracts, etc.
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b. **My Carts and Orders** – pages related to draft carts and orders.
   - Open My Active Shopping Cart – view/modify the current shopping cart and prepare the cart for processing (e.g., add shipping information, populate custom fields.)
   - View Carts – Listing of your active and draft carts as well as assigned and returned carts. Ability to create new carts and delete existing carts via this page.
   - View My Orders (Last 90 Days) – automatically search for requisitions completed by you in the last 90 days.

3. **Orders** – Menu relating to document searches and requisition approval tasks. *Exact menu items may vary depending on your BearBuy role.*
   a. **Search** – activities relating to searching for documents.
   
   b. **Approvals** – Find requisitions pending your approval, your recently approved requisitions, and an option to set a substitute approver.
4. **Contracts** – page related to BearBuy contracts activity.
   a. **Search Contracts** – search for contracts available in BearBuy. These contracts are typically created by a Supply Chain Management (SCM) Buyer. There are a select number of UCOP contracts available as well.

5. **Accounts Payable** – pages relating to invoice and receipt activities. *Exact menu items may vary depending on your BearBuy role.*
   a. **Invoices > AP Home** – Page with shortcuts to searches, receipt creation, and voucher related approval lists.
   b. **Invoices > Search For Invoices** – Document Search page to search for vouchers.
   c. **Receipts > View Draft Receipts** – Lists receipts that have been created and saved but not yet completed.
   d. **Receipts > Search For Receipts** – Document Search page to search for receipts.
   e. **Receipts > Create New Receipt...** – Displays a pop-up window where you can enter a new receipt.
   f. **Approvals** – Find invoices pending your approval, your recently approved invoices, and an option to set a substitute approver.
<table>
<thead>
<tr>
<th>10. Shop at the Top</th>
<th>Conduct Simple and Advanced searches to find items in the BearBuy hosted catalogs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Shop Image]</td>
<td>![Go Button]</td>
</tr>
</tbody>
</table>

| 11. BearBuy News  | Provides important BearBuy information such as upcoming dates, links to training/education materials, changes in the purchasing process, and more. |
| (aka The Organization Message) |                                                                 |
| ![Welcome Image] | ![Support Image]                                                                |

<table>
<thead>
<tr>
<th>12. Punch-outs and Catalogs</th>
<th>Access Punch-out and catalog suppliers. These suppliers are grouped in sections by category. Each section can be collapsed by clicking on the down arrow next to the section title. Each section can be expanded by clicking the right arrow next to the section title.</th>
</tr>
</thead>
<tbody>
<tr>
<td>![General Purchases and Supplies Image]</td>
<td>![Computer Software/Hardware Image]</td>
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<tr>
<th>13. Forms</th>
<th>Most BearBuy Forms appear at the bottom of the Shopping Homepage under the Frequently Used Forms and Forms for Specific Purchases sections.</th>
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<tbody>
<tr>
<td>![Frequently Used Forms Image]</td>
<td></td>
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<th>14. My Resources</th>
<th>Lists system support contact email and telephone number.</th>
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<th>15. Menu Search</th>
<th>Enter keywords to search for the menu that contains your keyword when you are unsure where to find the page in BearBuy.</th>
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<tbody>
<tr>
<td>![Menu Search Image]</td>
<td>![Menu Search (Alt+M) Image]</td>
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