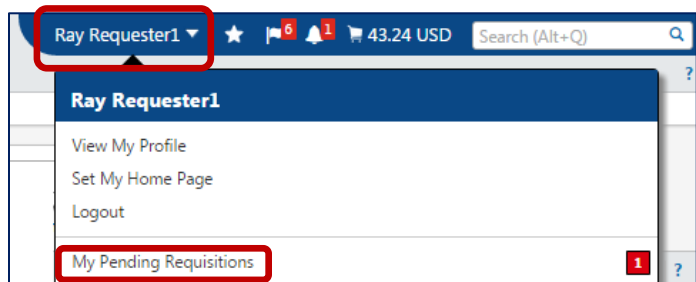
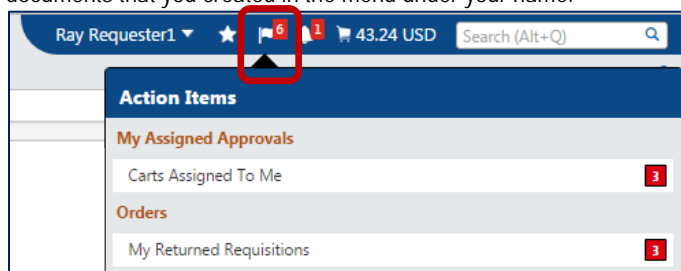


## Accessing BearBuy

- Log into [MyAccess](#) and select the [BearBuy](#) link.
  - By default, you will be directed to the Shopping Homepage, unless you set your homepage to a different BearBuy page.
  - If you are not on the Shopping Homepage, use the icons on the left to go to [Shop > Shopping > Shopping Home](#).
- Review the [Bulletin Board](#) on the left side of the homepage for announcements, such as system downtimes or Supply Chain Newsletters.

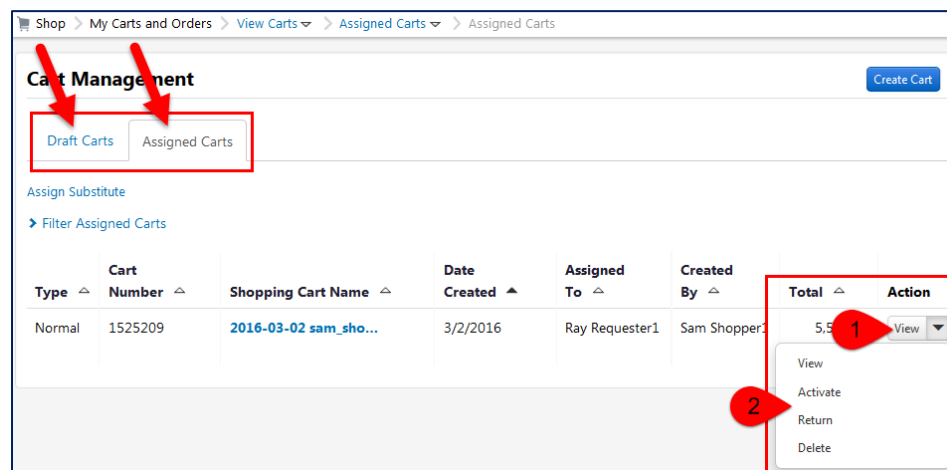
## Reviewing Pending, Recent, and Action Items

- Using the links at the top navigation menu, you can review [Action Items](#) that require your review and possible action from you. You can also review the status of your documents that you created in the menu under your name.



## Assigned Shopping Carts

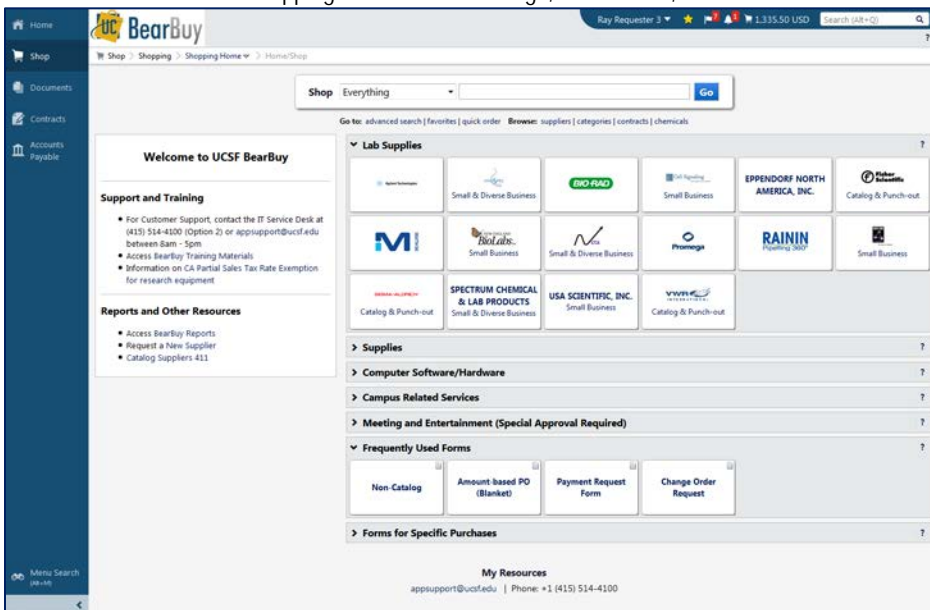
- Requesters must retrieve Shopping Carts assigned to them by Shoppers. Shoppers specify one person to be the Requester for their cart, and action must be taken before the cart can be routed for approval as a requisition.
- To retrieve an assigned cart, use the icons on the left to go to [Shop > My Carts and Orders > View Carts](#).
  - On the Cart Management page, there are two tabs representing different types of carts:
    - Draft Carts**—lists draft carts that you created and requisitions that have been returned to you by an approver for action. Click on the **Action** dropdown (to the right of the cart) to **View**, **Activate**, or **Delete** the cart.
    - Assigned Carts**—lists carts that have been assigned to you by Shoppers. These carts require action. Click on the **Action** dropdown (to the right of the cart) to **View**, **Activate**, or **Delete** the cart, or **Return** the cart to the Shopper.
  - Click on any Shopping Cart's Name to begin editing the cart.



- When placing an order for a Shopper, always carefully review any information the Shopper may have entered such as the **Procurement Department Code**, **Ship To Address**, and **Accounting Codes**. Ensure that this information is accurate before placing the order.

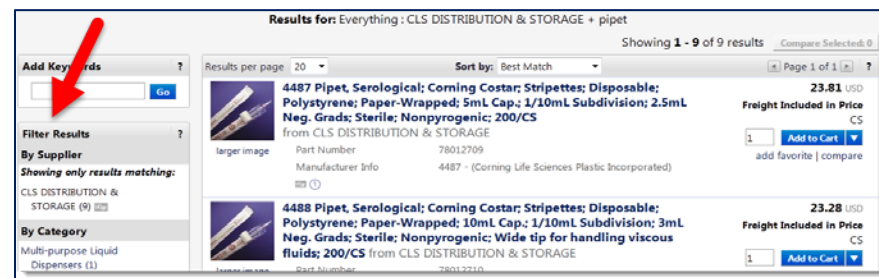
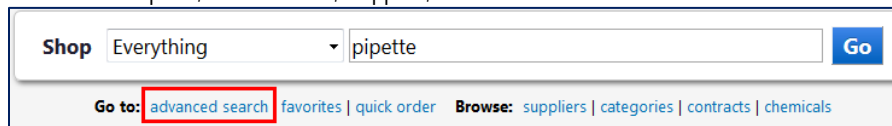
## Ways to Shop

- ▶ This section covers Shopping with Hosted Catalogs, Punch-outs, and Forms.



## Shop with Hosted Catalogs

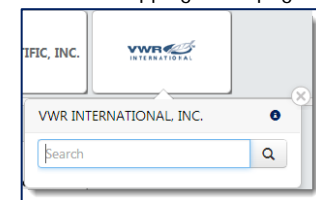
- ▶ The BearBuy Hosted Catalogs contain thousands of items from preferred suppliers at University-specific pricing.
1. To search for items in the hosted catalogs, enter your search terms in the **large search box** at the top of the Shopping Homepage, and then click the **Go** button.
  2. Optionally, click on the **advanced search** link to search by additional criteria, such as Product Description, Part Number, Supplier, or Manufacturer Name.



3. The search results appear. The product picture (if any), description, and other detailed specifications are typically shown.
  - a. On the left side are the **Filter Results** options. This lets you filter the search results by **Supplier, Manufacturer, Unit of Measure** and more.
  - b. Use the **compare** link to compare two or more items. Once you have flagged several items to compare, click the **Compare Selected** button. **Compare Selected: 2**
4. Click the **Add to Cart** button to add items to your cart. **Add to Cart**
5. To access the shopping cart after adding an item, select the **1 item(s) added, view cart** link, or click the cart icon located at the top right corner of page.
6. To continue shopping, use the icons on the left to go to **Shop > Shopping > Shopping Home**.

## Shop with a Specific Hosted Catalog Supplier

- ▶ If you would like to search the product offerings of a specific hosted catalog supplier, use the search associated with the hosted catalog supplier's icon on the Shopping Homepage.
  - ▶ A hosted catalog supplier's icon contains only the supplier's name.
1. Click the **catalog supplier's icon**.
  2. Enter search terms in the search box that appears below the supplier's icon. Click the **magnifying glass** icon.
  3. The search results appear. The product picture (if any), description, and other detailed specifications are typically shown.
    - a. On the left side are the **Filter Results** options. This lets you filter by **Supplier, Manufacturer, Unit of Measure** and more.
    - a. Use the **compare** link to compare items. Once you have flagged several items to compare, click the **Compare Selected** button. **Compare Selected: 2**
  4. Click the **Add to Cart** button to add items to your cart. **Add to Cart**
  5. To access the shopping cart after adding an item, select the **1 item(s) added, view cart** link, or click the cart icon located at the top right corner of page.
  6. To continue shopping, use the icons on the left to go to **Shop > Shopping > Shopping Home**.



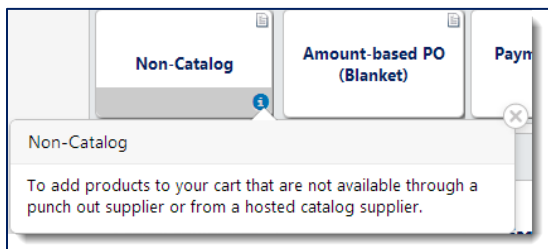
## Shop with Punch-outs

- ▶ **Punch-outs** connect to the supplier's website containing contract pricing. Punch-out sites retain the look and feel of the supplier's regular public website; however, the checkout will result in the products returned to BearBuy and added to the active cart.
  - ▶ Punch-outs are identified on the Shopping Homepage by a symbol in the upper right corner above the supplier name.
  - ▶ Follow the supplier's directions for submitting the items back to BearBuy as each supplier's site may differ. Product pricing and availability may vary between the supplier's public and University websites.
1. Click the **supplier's icon** to begin the Punch-out session.
  2. **Search** in the supplier's catalog for items and **add** to the supplier's shopping cart.
  3. Complete shopping on supplier's site, then return items to the BearBuy shopping cart.
    - a. If you are only browsing the Punch-out and are not returning items to BearBuy, you may exit the Punch-out by closing the Punch-out window and clicking the **Cancel Punch-out** button in the main browser page.



## Shop with Forms

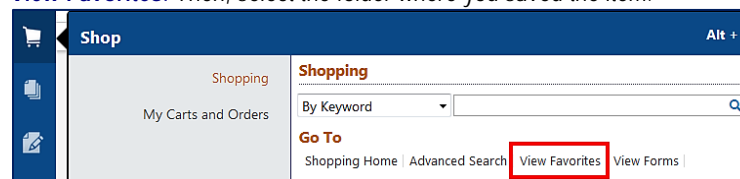
- ▶ Use **Forms** to create shopping carts for non-catalog items. There are several forms, including Non-Catalog, Amount-based PO (blanket), and Payment Request.
  - ▶ Forms are identified on the Shopping Homepage by a form symbol in the upper right corner above the form name.
1. From the Shopping homepage, select a form. All available forms are accessible from the homepage. The **Frequently Used Forms** and **Forms for Specific Purchases** section of the homepage contain the majority of available forms.
    - a. A full listing of Forms is also found in the cart icon on the left menu under **Shop > Shopping > View Forms**.
    - b. To obtain more detail on what a form is used for, hover over the name of the form until the icon appears. Click on the icon and a description of the form will appear.



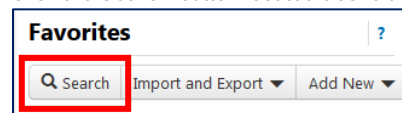
2. **Enter** all required information (indicated in bold on the form).
3. Select **Add and go to Cart** from the form's Available Actions dropdown menu.
4. Click the **Go** button to add the form to the shopping cart. You will be directed to your cart.

## About Favorites

- ▶ Add routinely ordered items to a favorites folder for quick re-ordering.
  - ▶ Only hosted catalog items and forms can be added as Favorites.
1. Navigate to the item you would like to favorite.
    - a. For catalog items, search for the item. Select the item's corresponding **add favorite** link in the search results.
    - b. For forms, open the form you would like to favorite. Fill out the form with information you want to save. This information will be retained whenever you add the form to your cart. Navigate to the **Available Actions** menu at the top of the form and choose **Add to Favorite** in the dropdown menu. Click the **Go** button.
  2. A pop up window appears. Edit the **Item Nickname** (if desired). The correct product name will display on the requisition and purchase order to the supplier.
  3. Select the **Destination Folder** to save the item to an existing favorites folder (or create a new folder using the **Add New** link) and click the **Save Change** button. A message will appear noting the product has been added to the folder.
- ▶ To access saved Favorites, use the icons on the left to go to **Shop > Shopping > View Favorites**. Then, select the folder where you saved the item.



- ▶ Favorites can also be searched.
1. Use the icons on the left to go to **Shop > Shopping > View Favorites**.
  2. Click the **Search** button located above the favorites folders. A search box appears.





3. Enter **keywords** you are searching for. Click the **magnifying glass icon** to search.
4. The search results return favorites and favorites folders that contain your search keywords.
5. Click on a result to navigate to the folder or favorite.
6. To add a saved favorite to your cart, click the favorite's corresponding **Add to Cart** button.


## Updating and Editing Shopping Cart Items

1. After adding items to your shopping cart, select the appropriate item by checking the corresponding checkbox  next to the item.
2. **Add to favorites, remove selected items, or move to another cart** using the **Perform an action on...** dropdown.

## Proceed to Checkout

- ▶ Clicking the **Proceed to Checkout** button  displays details that will be part of the future requisition. This level of information is typically entered by the Requester, but can be entered by the Shopper or Requester.
- ▶ A cart may be assigned to another Shopper or Requester so that this information can be added or reviewed. Click the **Assign Cart** button  to assign the cart.

## Add Accounting Codes (chartfields), Ship To Address, etc.

1. Missing information, such as Ship To Address or Accounting Codes, will appear as an error (  ) at the top of the page.
  2. Enter the **Ship To Address**, **Speedtype**, **Fund**, etc. as needed.
  3. Click the **Save** button.
- ▶ **TIP:** The Account field of the Accounting Codes section is not required and can be blank in BearBuy. The Account will default to a value based on the selected Commodity Code for the item when the PO is sent to PeopleSoft.


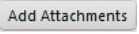
<b>Commodity Code</b>	00111 - Lab Supplies <b>52203</b>
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- ▶ If you want to use an Account other than the default Account, edit the line item Accounting Code (chartfield) and enter the desired Account code.

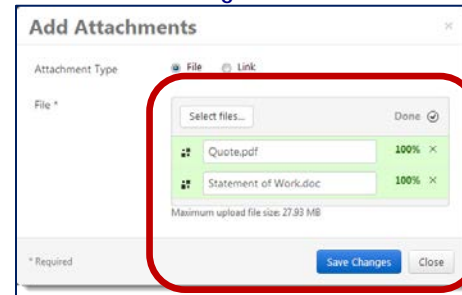
## Splitting Distributions across Accounting Codes (chartfields)

1. On the **Requisition > Summary** tab, scroll down to the **Accounting Codes** section.
2. Click the line **edit** button. Click the **add split** link—select **% of Price** (or **% of Qty** or **Amount of Price**) from the dropdown. Enter the split percent or amount.
3. Click the **Save** button.

## About Notes and Attachments

- ▶ **Internal and External Notes and Attachments** may be added to the requisition.
  - ▶ Attachments remain with the requisition and purchase order indefinitely, and are visible to all approvers of the requisition. Suppliers who receive the purchase order by fax or email can accept external notes and attachments with a PO.
  - ▶ Warning Notifications (*flagged with this icon:* ) will indicate if notes and attachments are not accepted by some suppliers—typically those with hosted catalogs or Punch-outs. These messages do not prevent your purchase order from being sent to the supplier.
1. On the **Requisition > Summary** tab, click any **Add Attachments** button , but be careful to select Internal Attachments or External Attachments as appropriate.
  2. Add file(s) or links (URLs).
    - a. If attaching files, click the **Select files...** button to upload one or more files.
      - i. Alternatively, you can also drag files from your computer to the gray space next to the **Select Files...** button to upload one or more files.
      - ii. **NOTE:** uploading multiple files or dragging files to upload is not supported in Internet Explorer 8 or 9 and older versions of Firefox ERS.

- b. Wait for all the files to be uploaded. The number next to the file name shows what percentage of the file is uploaded. 100% means the file is completely uploaded. The gray area next to the **Select Files...** button will show the text **Done** when the upload is complete.
  - c. Optionally, rename the file(s) by typing over the file names in the text box.
3. Click the **Save Changes** button to save the fully uploaded attachments.



- ▶ If you need to move an uploaded file between an internal and external attachment section of a requisition, click on the **dropdown menu** next to the file's corresponding **Remove** link, and then select the **Move to Internal (or External) Attachments** option.



- ▶ If you need to remove an attachment, click the **Remove** link next to the attachment.

## Adding Optional Approvers

- ▶ BearBuy provides three options for “user defined” approvals for requisitions—these are in addition to any required approvals generated by BearBuy such as the Requisition Approval.
- ▶ When the Requester edits the cart, s/he can specify individuals as a *Requisition Pre-Approver*, and up to two additional *Ad Hoc Approvers*.
- ▶ **Requisition Pre-Approver**
  - The Requisition Pre-Approver reviews the order according to the department’s internal business approval process.
  - This Approver is **optional and only added as needed**—an approval occurs **before** the Requisition Approver or Ad Hoc Approvers, if any.
- ▶ **Ad Hoc Approver 1 or 2**
  - The Ad Hoc Approver reviews the order according to the department’s internal business approval process.
  - The Ad Hoc Approver is **optional and only added as needed**—approval occurs **after** the Requisition Approver, if any.

- ▶ **TIP:** Departments may instruct Shoppers or Requesters to add Ad-Hoc approver(s) for split funds or specific type of purchases, but should not be used for every order.
- ▶ Optional Approvers must have the Requisition Approver role in BearBuy to be selected.
- ▶ Unlike the regular Departmental Requisition Approval process, *only* the person designated as an Optional Approver can approve of the requisition. Optional Approval Folders are not shared by multiple Requisition Approvers.


1. On the [Requisition > Summary](#) tab, locate the **Optional Approval** section on the right.
2. Click the **edit** button.
3. Choose an Optional Approver Type (i.e. Ad Hoc Approver 1, etc.) and click the corresponding **Select from all values...** link.
4. A pop-up search box appears. Enter the name of the Approver you want to designate as an Optional Approver and click the **Search** button.
5. In the results list, click the **select** link next to the name of the Approver.
6. Repeat the process if you would like to designate more than one Optional Approver—up to one person for each approval type.
7. Click the **Save** button after all Optional Approvers have been designated.

## Place Order

- ▶ When edits to the cart are complete (including all Accounting Codes, Ship To Address, and any Optional Approvers), the Requester clicks the **Place Order** button to start the requisition workflow.



## Status of Requisition Approval

1. To check the approval status of a requisition, use the icons on the left to go to [Documents > Document Search > Search Documents](#). 
2. Click **my requisitions**.
3. Click the **Requisition No.**
4. Click on the **PR Approvals** tab on the requisition to view the approval status.
5. Click the **view approvers** link to view the approvers responsible for approval.

## Withdraw a Requisition

- ▶ Requisitions which are pending (not fully approved) can be withdrawn from approval workflow.
1. Navigate to the requisition that you would like to withdraw.
  2. Click the **PR Approvals** tab on the requisition to view the approval status.
  3. From the **Available Actions** dropdown (in the upper right corner), select **Withdraw Entire Requisition**.
  4. Click the **Go** button.
  5. Enter the **reason** for withdrawal.
  6. Click **OK**.

## About Requisition Approval Thresholds

- ▶ **Requisitions \$500 or less** are automatically approved after the Requester submits the order. **Requisitions over \$500** require Requisition Approval before being dispatched as a Purchase Order.
- ▶ Upon completion of the approval process, the Purchase Order number is generated and the order is automatically dispatched to the supplier via the supplier’s preferred method (fax/email/cXML).