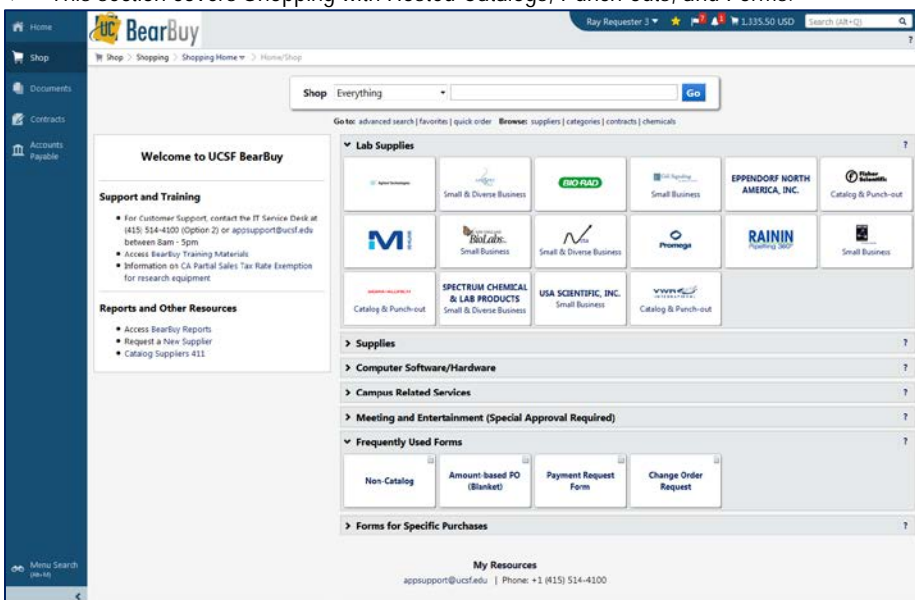


Accessing BearBuy

- 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.

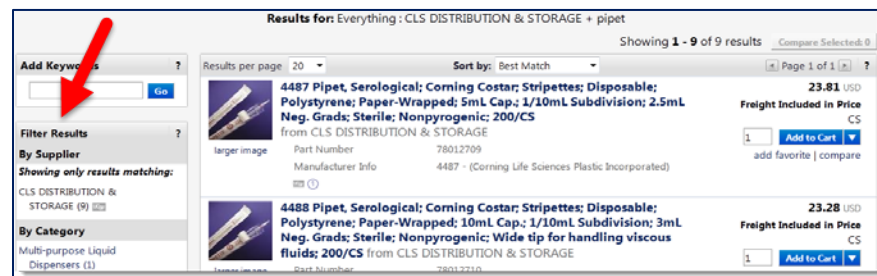
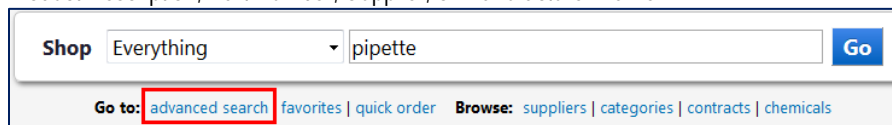
Ways to Shop

- 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.
- 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.
 - Optionally, click on the **advanced search** link to search by additional criteria, such as Product Description, Part Number, Supplier, or Manufacturer Name.

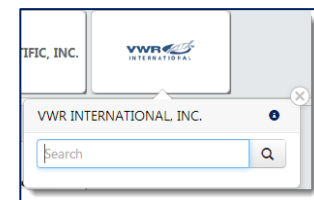


- The search results appear. The product picture (if any), description, and other detailed specifications are typically shown.
 - On the left side are the **Filter Results** options. This lets you filter the results by **Supplier, Manufacturer, Unit of Measure** and more.
 - Use the **compare** link to compare two or more items. Once you have flagged several items to compare, click the **Compare Selected** button.
- Click the **Add to Cart** button to add items to your cart.
- 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 the page.
- 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.
- Click the **catalog supplier's icon**.
 - Enter search terms in the search box that appears below the supplier's icon. Click the **magnifying glass** icon.
 - The search results appear. The product picture (if any), description, and other detailed specifications are typically shown.
 - On the left side are the **Filter Results** options. This lets you filter by **Supplier, Manufacturer, Unit of Measure** and more.
 - Use the **compare** link to compare items. Once you have flagged several items to compare, click the **Compare Selected** button.
 - Click the **Add to Cart** button to add items to your cart.
 - 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 the page.
 - To continue shopping, use the icons on the left to go to [Shop > Shopping > Shopping Home](#).



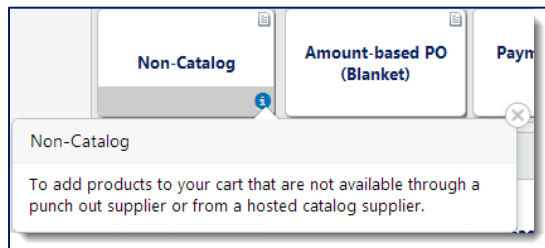
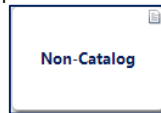
Shop with Punch-outs

- ▶ **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

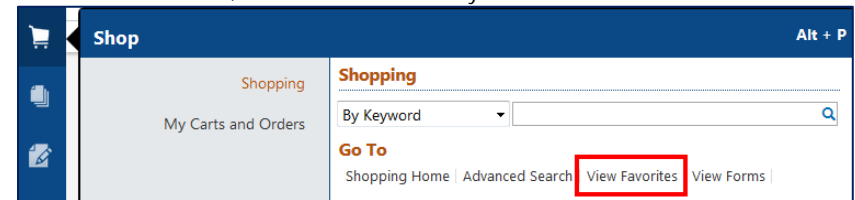
- ▶ Use **Forms** to create shopping carts for non-catalog items. There are several forms, including Non-Catalog, Amount-based PO (blanket), and Payment Request.
 - ▶ Forms are identified on the Shopping Homepage by a form symbol in the upper right corner above the form name.
1. From the Shopping homepage, 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.



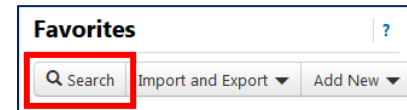
2. **Enter** all required information (indicated in bold on the form).
3. Select **Add and go to Cart** from the form's Available Actions dropdown menu.
4. Click the **Go** button to add the form to the shopping cart. You will be directed to your cart.

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.

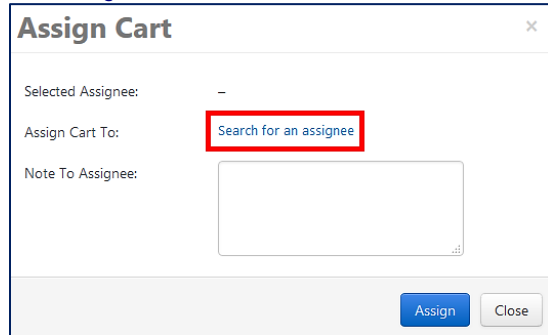
Updating and Editing Shopping Cart Items

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.

Assign Cart

Once you are done shopping, assign the cart to the desired Requester.

1. Click the **Assign Cart** button. 
2. Specify the **Requester**.
 - a. If you do not have any Requesters saved in your profile:
 - i. Search for the Requester you will assign the cart to by clicking the **Search for an assignee** link.



Assign Cart

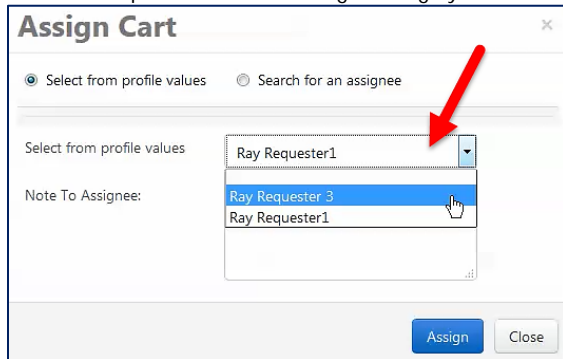
Selected Assignee: -

Assign Cart To: [Search for an assignee](#)

Note To Assignee:

Assign **Close**

- ii. In the pop up window, enter the name of the Requester.
- iii. From the results listing, select your Requester.
- b. If you have the Requester saved to your profile:
 - i. Click the **Select from profile values** radio button. Use the dropdown to display a listing of Requesters you previously saved to your profile. You may choose a Requester from this listing to assign your cart to the person.



Assign Cart

Select from profile values Search for an assignee

Select from profile values: Ray Requester1

Note To Assignee:


Ray Requester 3

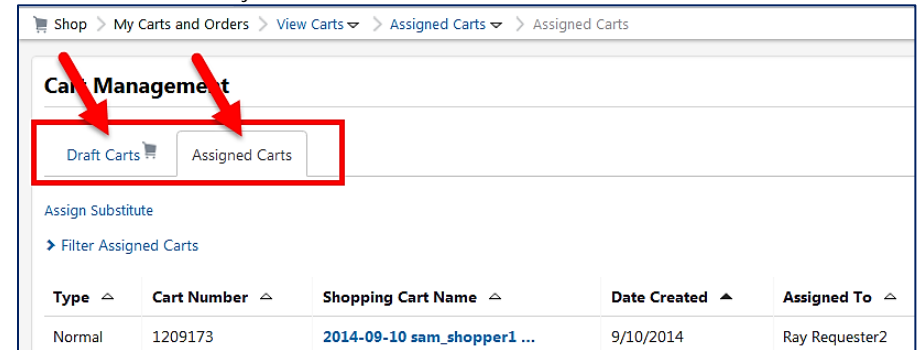
Ray Requester1

Assign **Close**

3. You can enter a **comment** for the Requester if needed in the **Note to Assignee** box.
4. Click the **Assign** button. BearBuy will send an email notification of the assigned shopping cart to the Requester.

Status of your Cart

1. To view your shopping carts, use the icons on the left to go to  **Shop > My Carts and Orders > View Carts**.
2. On the Cart Management page, there are two tabs representing different types of carts:
 - a. **Draft Carts**—lists carts that you created but have not assigned to a Requester yet, and carts returned to you by a Requester. Click on the **Action** dropdown (located to the right of the cart) to **View**, **Activate**, or **Delete** the cart.
 - b. **Assigned Carts**—lists carts that you assigned to a Requester but the Requester has not submitted yet.




Cart Management

Draft Carts **Assigned Carts**

Assign Substitute

Filter Assigned Carts

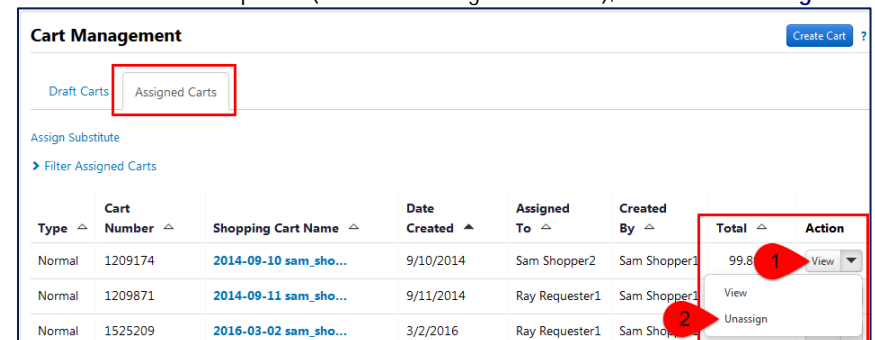
Type	Cart Number	Shopping Cart Name	Date Created	Assigned To
Normal	1209173	2014-09-10 sam_shopper1 ...	9/10/2014	Ray Requester2

Once the Requester has processed and submitted the cart you assigned, it will no longer be listed on the carts page. Completed carts become requisitions and are shown under  **Shop > My Carts and Orders > View My Orders (Last 90 Days)**.

Unsigning Shopping Carts

Assigned carts can be unassigned if you need to edit the cart or change the Requester.

1. Use the icons on the left to go to  **Shop > My Carts and Orders > View Carts**.
2. On the Cart Management page, click on the **Assigned Carts** tab and locate the cart.
3. Click on the **Action** dropdown (located to the right of the cart), and select **Unassign**.



Cart Management

Draft Carts **Assigned Carts**

Assign Substitute

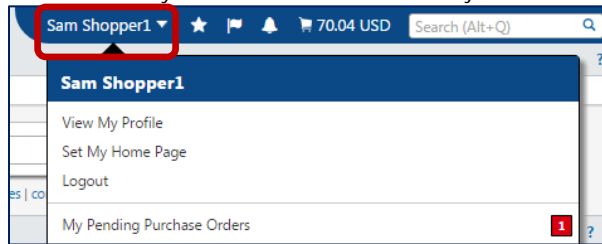
Filter Assigned Carts

Type	Cart Number	Shopping Cart Name	Date Created	Assigned To	Created By	Total	Action
Normal	1209174	2014-09-10 sam_sho...	9/10/2014	Sam Shopper2	Sam Shopper1	99.8	View
Normal	1209871	2014-09-11 sam_sho...	9/11/2014	Ray Requester1	Sam Shopper1		View
Normal	1525209	2016-03-02 sam_sho...	3/2/2016	Ray Requester1	Sam Shopper1		Unassign

4. The cart will now appear under the **Draft Carts** tab.

Reviewing Pending, Recent, and Action Items

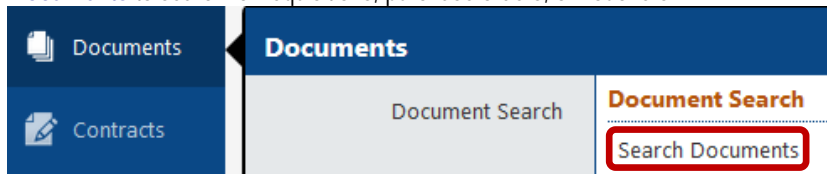
- ▶ Use the links at the top to review **Action Items** and **Notifications** that require your review and possible action from you. You can also review the status of your documents that you created in the menu under your name.



Requisition and Purchase Order History

- ▶ All requisitions and purchase orders are permanently stored within BearBuy.

1. Use the icons on the left to go to **Documents** > **Document Search** > **Search Documents** to search for requisitions, purchase orders, or vouchers.

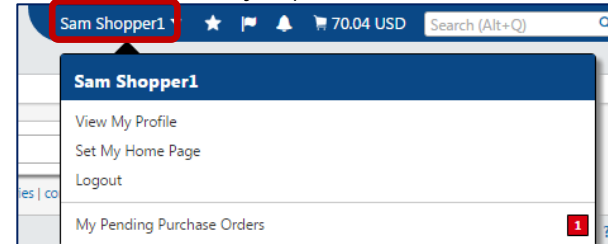


2. In the **Search Criteria** dropdown, select **Requisition**, **Purchase Order**, or **Voucher** and conduct a search.
 - a. You may also use the links to **my requisitions**, **my purchase orders**, and **my vouchers** to conduct a search for your documents of a specific type.
3. You can search by **Custom Fields** appropriate for the document, such as **Procurement Dept Code** or Accounting Codes (chartfields) such as **Fund**.
4. In the search results, click the **Requisition**, **PO**, or **Voucher No.** links to view the document summary, detail, and approval history.
 - ▶ Shoppers only have access to orders they shopped for.
 - ▶ Shoppers **cannot** see or search for another person's orders.

Reviewing Your Profile

- ▶ Note: Some profile fields are view-only and cannot be edited.

1. Click on your name in the upper right of the page. In the pop-up menu, click the **View My Profile** link to access your profile.



2. Use the menu on the left to review your profile information.
 - a. **User Profile and Preferences**—lists your contact information.
 - b. **Notification Preferences**—lists your BearBuy notification preferences. You may update your notification preferences as desired.
3. If you will be adding purchasing information such as accounting codes (i.e. SpeedType, Fund, Account, etc.), click **Default User Settings > Custom Field and Accounting Code Defaults**. Click **Default Addresses** to review/edit shipping addresses.
4. Click the **Save** button to save any edits.

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.
- ▶ A cart may be assigned to another Shopper or Requester so that this information can be added or reviewed.

Proceed to Checkout: Adding Accounting Codes (chartfields), Ship To Address, etc.

1. Missing information, such as Shipping Address or Accounting Codes, will appear as an error () at the top of the page. Enter the missing information as needed.

Proceed to Checkout: 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.