



University of California  
San Francisco

Supply Chain Management

# BearBuy: 22.3 New Feature Review

November 2022

# Reminder: BearBuy Unavailable



Jaggaer 22.3 Release will be promoted to our BearBuy production environment the weekend of November 4 and there will be associated downtime.

BearBuy production downtime will take place between **Friday, November 4, at 6 p.m. through Sunday, November 6, at 9 a.m.** to upgrade from release version 22.2 to 22.3.

## What to expect during the outage:

- BearBuy will not be available
- Please complete all BearBuy requests prior to the outage
- BearBuy will be available on Monday, November 7.



# What to Expect in This Release



The Jaggaer **22.3** Release introduces a redesigned modern interface for **forms**, with an updated look and feel for better usability while maintaining the existing form functionality. Other improvements include more intuitive button locations and action menus.

This release also includes the addition of the **Supplier Name** on the document header for purchase orders and vouchers and general updates to the user interface with updated navigation icon location.



# 22.3 Forms – New Experience View

Redesigned modern interface for forms for enhanced usability.



Amount-based PO (Blanket) Available Actions: Add and go to Cart Go Close

**Instructions** ?

If supplier is not available, please [Request a New Supplier](#).

**Supplier Information** ?

Enter Supplier

Contract

**Product Description**

**Price**

**Commodity Code**

**Quantity**

**If the supplier has access to Protected Health select HIPAA. Otherwise select NO.**

**Complete the following ONLY if purchasing service**

**Service Dates**

Start Date

mm/dd/yyyy

**If requesting services to be provided at a local leased by UC, select FW/FW.**

Check this box if the requisition requires Prevailing

**Goods / Services Description & Pricing T**

To the best of my knowledge, this purchase does

**Form Guidelines:**

- Use this form to create 'amount only' purchase requests based on a dollar amount limit for:
  - Non-Catalog Goods**  
i.e. testing kits, etc.
  - Common Services**  
i.e. repairs, sequencing services, etc.

To request Professional Services, Personal Services or Independent Consulting, use the [Professional/ Personal/ Consulting Services Form](#).

- Fill out all required fields shown in **bold text**.
- If purchasing **common services**:
  - Fill out the **Service Information** section
  - If available, attach a **Vendor Quote / Proposal** as an External Attachment
- If an attached document is for both external and internal viewing, attach it **ONLY** in the

Before 22.3

After 22.3

BearBuy UNIVERSITY OF CALIFORNIA, SAN DIEGO Supply Chain Management

All Search (Alt+G) 0.00 USD

Form · Amount-based PO (Blanket) Close Add And Go To Cart

**Instructions** ?

If supplier is not available, please [Request a New Supplier](#).

**Supplier Information** ?

Enter Supplier \*

Select Supplier

Contract

**Goods / Services Description & Pricing** ?

Product Description \*

254 characters remaining expand | clear

Total 0.00 USD

**Form Guidelines:**

- Use this form to create 'amount only' purchase requests based on a dollar amount limit for:
  - Non-Catalog Goods**  
i.e. testing kits, etc.
  - Common Services**  
i.e. repairs, sequencing services, etc.

To request Professional Services, Personal Services or Independent Consulting, use the [Professional/ Personal/ Consulting Services Form](#).

# 22.3 Forms – New Experience View

Forms have an improved look and feel for better usability, but the same functionality is available.

**Before 22.3**

**After 22.3**

The **Close** button for forms is now in the top right banner.

Form sections and form action drop-down menus have been redesigned but remain in the same familiar locations on the page.

# 22.3 Forms – Dynamic Total

**Total amount** on forms is dynamic and will update as the form is completed, attachments are added, or other changes are made to refresh the page.

Price: 1000  
Commodity Code: [dropdown]  
Quantity: 1  
If the supplier has access to Protected Health Information (PHI), select HIPAA. Otherwise select NO. [Please select...]  
Complete the following ONLY if purchasing services.  
Service Dates  
Start Date: [mm/dd/yyyy] [calendar icon]  
End Date: [mm/dd/yyyy] [calendar icon]  
If requesting services to be provided at a location owned or leased by UC, select FW/FW. [Please select...]  
Check this box if the requisition requires Prevailing Wages.   
Goods / Services Description & Pricing Total: 0.00

After 22.3

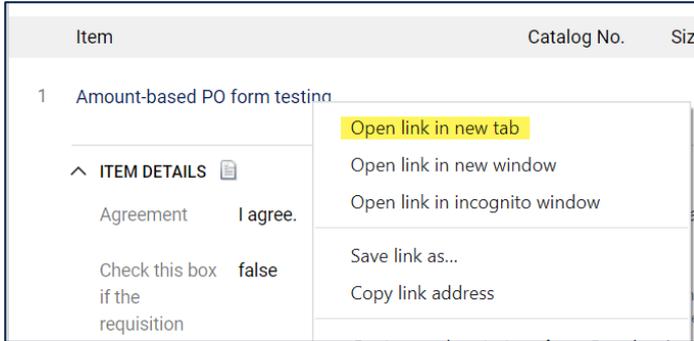
Before 22.3

The total value of the form can be seen before adding to a cart.

i.e. repairs, sequencing services, etc.  
To request Professional Services, Personal Services or Independent Consulting, use the [Professional/ Personal/ Consulting Services Form](#).  
2. Fill out all required fields shown in **bold text**.  
3. If purchasing **common services**:  
o Fill out the **Service Information** section  
o If available, attach a **Vendor Quote / Request for Proposal**  
Goods / Services Description & Pricing  
Product Description \* [254 characters remaining] [expand | clear]  
Price \* 1000  
Commodity Code \* [dropdown]  
Quantity \* 1  
Total 1,000.00 USD

# 22.3 Forms – General Updates

Previously, viewing a form would open a separate window. In 22.3, a form will open in the current window, however you can choose to open forms in a new tab.



Right-click the form link and select “Open link in new tab”.



Using right-click to open the form in a new tab will allow you to work on forms separately from the document that was open.

# 22.3 Forms – General Updates

Other improvements include the addition of a star to identify required fields and redesigned date fields and check boxes.

A screenshot of a web form with a yellow border. At the top left, there is a text input field labeled "Enter Supplier" with a red star icon to its right and a red arrow pointing to it. To the right of this field is a "Select Supplier" dropdown menu with a search icon. Below this is a "Contract" section. Further down is a section titled "Goods / Services Description & Pricing". Inside this section is a "Product Description" text area with a red star icon to its left and a red arrow pointing to it. At the bottom of the text area, it says "254 characters remaining" and "expand | clear".

Required form fields are marked with a star

Before 22.3

A screenshot of a web form before update 22.3. It shows a "Please select..." dropdown menu. Below it is a calendar for "October 2022" with a red border. A red arrow points from the calendar to a checkbox in the "Conflict of" section, which is also circled in red. Below the calendar are "[close]" and "[clear]" buttons. At the bottom, there is a "I agree" radio button.

After 22.3

A screenshot of a web form after update 22.3. It shows a redesigned date field with a blue header "Monday" and "OCT 31 2022". Below the date field is a calendar for "2022" and "October". A red arrow points from the "Conflict of" checkbox in the "Before 22.3" screenshot to a new, larger checkbox in the "After 22.3" screenshot, which is also circled in red. At the bottom of the date field, there are "TODAY", "CLEAR", and "CLOSE" buttons.

Date fields and checkboxes have been redesigned

# 22.3 New Experience View – General Updates

Several new enhancements have been introduced for improved usability.

The screenshot shows the BearBuy interface for a voucher. The header includes the BearBuy logo, University of California, San Francisco Supply Chain Management, and navigation elements like 'All', 'Search (Alt+Q)', '0.00 USD', and a notification bell. The voucher details are displayed in a card format with tabs for 'Summary', 'Matching', 'Supplier Messages', 'Comments', 'Attachments', and 'History'. The 'Supplier Name' 'FISHER SCIENTIFIC-TEST' is highlighted in a green box. A red box highlights a three-dot menu icon, which has opened a dropdown menu with options: 'Assign', 'Assign & Approve and Match', 'Add Comment', 'Copy to new invoice', 'Create Recurring Invoice', 'Add Notes to History', 'Assign Contract to All Lines', 'Add Invoice Image', and 'See configuration for this invoice'. A yellow box highlights navigation arrows on the right side of the interface.

Supplier name added to the header of purchase orders and vouchers

Document-level actions have been relocated to the right side with a new icon

Document navigation buttons have been moved to the right

# 22.3 Supplier Name on the Document Header

The document layout has been enhanced to include the **Supplier Name** in the header of **purchase orders** and **vouchers**.

Before 22.3

The screenshot shows the BearBuy interface for a purchase order. The header displays "Purchase Order • B001099601 Revision 1 (Closed)". Below this, a yellow box highlights the updated header for "Purchase Order • OFFICE DEPOT • B00005973C Revision 0". A yellow arrow points to the "OFFICE DEPOT" text. The interface includes tabs for "Status", "Summary", "Revisions", "Confirmations", "Shipments", and "Receipts". The "Summary" tab is active, showing "General Information" and "Shipping Information".

| General Information |                   | Shipping Information |                 |
|---------------------|-------------------|----------------------|-----------------|
| PO/Reference No.    | <b>B00005973C</b> | Delivery To Address  |                 |
| Revision No.        | 0                 | Deliver To Location  | <i>no value</i> |

After 22.3

Before 22.3

The screenshot shows the BearBuy interface for a voucher. The header displays "Voucher • 53664473". Below this, a yellow box highlights the updated header for "Voucher • ABCAM INC • 59003617". A yellow arrow points to the "ABCAM INC" text. The interface includes tabs for "Summary", "Matching", "Supplier Messages", "Comments", "Attachments", and "History". The "Summary" tab is active, showing "General" and "Addresses".

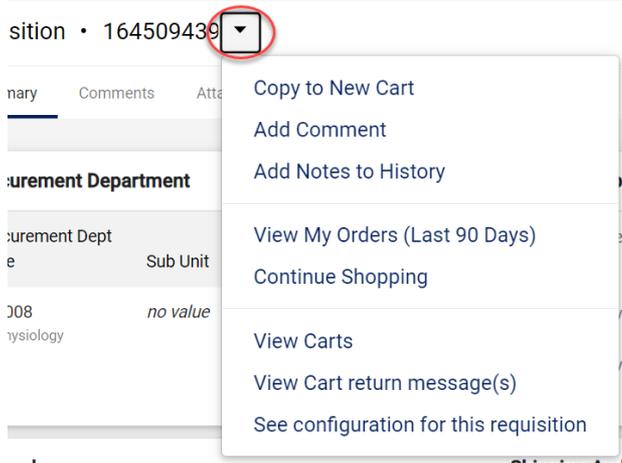
| General        |          | Addresses |             |
|----------------|----------|-----------|-------------|
| Invoice Type   | Voucher  | Remit To  |             |
| Voucher Number | 59003617 |           | PO BOX 3460 |

After 22.3

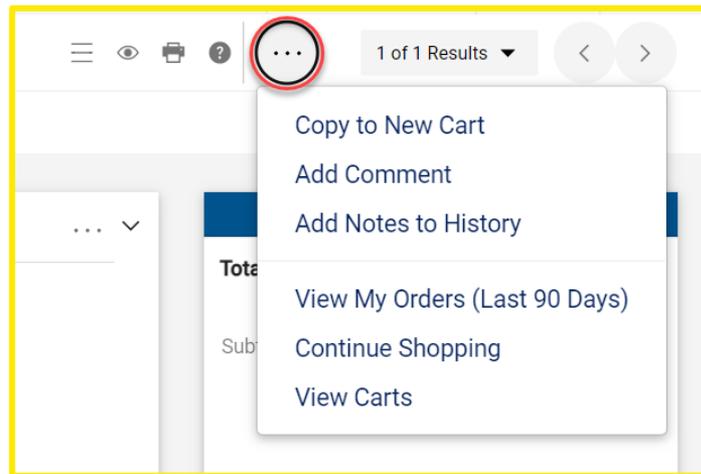
## 22.3 Document-Level Actions

Additional document **actions** have been relocated from a drop-down next to the header, to an action icon  on the top right of the page.

Before 22.3



After 22.3



# Browser Requirements



BearBuy is only supported on the following browsers and versions:

- Microsoft Edge - latest version
- Firefox - latest version
- Chrome - latest version
- Safari\* - latest version



\*Not all supplier punch-out sites will support the Safari browser.

# Resources

BearBuy Training Materials: <https://supplychain.ucsf.edu/bearbuy-training>

BearBuy System Requirements: <https://supplychain.ucsf.edu/bearbuy-training#System%20Requirements>

## Additional Questions

For BearBuy support, contact the IT Service Desk at (415) 514-4100 (Option 2) or [appsupport@ucsf.edu](mailto:appsupport@ucsf.edu) between 8 a.m. - 5 p.m.

