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A. SHP BearBuy Roles

**Shopper:**
- UC Berkeley staff, faculty, Graduate student, and all other student employees are Shoppers. Must have logged into BearBuy once to obtain access.
- Enters requests into BearBuy via a shopping cart; can assign or submit carts.
- Shoppers can edit cart, create multiple carts, unassign carts, reassign carts, etc.

**Cart Authorizer:**
- Cart Authorizers are Shoppers who have received assigned shopping carts.
  - A Shopper can route a Cart to another Shoppers for review.
  - When a shopping cart is routed to another Shopper (e.g., a program manager) for authorization or review before the cart is submitted, this Shopper is referred to as the **Cart Authorizer**.
- SPH has designated Cart Authorizers for each dept id. See the SPH financial org chart for Authorizers by dept id.

**Receiver [This function is the responsibility of the Shopper]:**
- Acknowledges receipt of goods and services in BearBuy by adding a comment “received, okay to pay” to either the requisition or purchase order and attaching packing slips or other relevant documents.
- CSS relies on this acknowledgement as an indicator that it is appropriate to release payment to the vendor.
B. Your BearBuy Profile

**Your Contact Information**
- Your contact information is displayed within the View My Profile link in BearBuy.
  - Your name, office phone number, and email address will be visible. All this information is synced into BearBuy from your directory listing.
- If one of the fields (phone number or email address) is incorrect, you'll have to update your directory listing. To do so, navigate to the UCB directory\(^1\) and select **Update Your Directory Listing**.

**Email Preferences Layout**
Within the User Information and Setting section, select the Notification preferences link.

The Notification Preferences separates notifications between Administration & Integration, Shopping Carts & Requisitions, Purchase Orders, Catalog Management, and Settlement.

Shoppers, Requisition Creators and Approvers may be interested in activating / deactivating email notifications. The name of each email notification message is listed in these sections.
- **None**: The notification is turned off. You will not receive this notification at all.
- **Email**: The notification is turned on and is sent to you via email only.
- **Notification**: Notification is turned on and is displayed on within Notification in BearBuy only. You will not receive an email notification.
- **Email & Notification**: The notification is turned on and you will receive it via email and displayed within Notification in BearBuy.

**Enable/Disable Email Notification**
1. In BearBuy, access your profile by clicking the icon and select **View My Profile**.
2. To enable an email notification, select from the top right corner of the email preferences list. Change **None** by selecting the **Override** radio button, then from the drop-down options select **Email**, (if available) **Notification** or **Email & Notification**.

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\(^1\) Cal Net Directory Listing: [https://calnet.berkeley.edu/directory/](https://calnet.berkeley.edu/directory/)
3. To disable a notification, select Edit Section from the top right corner of the email preferences list. Select Override, then from the drop-down options select None.

4. When complete, click the Save Changes button. You will see a Successfully Saved Changes message appear on your screen.
C. BearBuy Business Process at SPH

**High Level Workflow**
- The High-Level Business process (Appendix A) for SPH shows the major steps that are performed in the end-to-end workflow procure-to-pay process from shopping through review, authorization, approval, ordering, receiving, invoice processing, exception management and Voucher approval.

**Data Privacy**
- UC Berkeley policy requires strict access control over personally identified information (PII) that contains an individual’s name or initials combined with a social security number, credit card number, driver's license or state identification card number, any type of medical or medical insurance information, any personal financial account number, or full birthdates (MM/DD/YY).
- We refer to this set of PII as "notice triggering data."
- Any unauthorized access to notice triggering data requires us to notify the state and the individual, and subjects us to serious financial penalties and lawsuits.
- No document with visible notice triggering data in any electronic system (including BearBuy) may be electronically stored or transmitted without the prior approval of the UC Berkeley Privacy Office.
- A UCB individual’s home address and family information also require restricted access control.
- Before attaching any documentation to the BearBuy transaction, redact any sensitive and PII information so that it is unreadable on any documents attached to the Requisition being processed.

**Profile Management (BFS)**
- Profile Management is a tool in BFS that is used to maintain user profiles.
- Preferred Org Nodes, SpeedTypes, Chartstring values, Authorizers, Ship to addresses, and final destinations can be set up with Profile Management.
- Access to manage user profiles in BFS is requested through SARA.

**Chart Of Account (COA) Codes**
- Each department uses a unique COA combination when processing transactions.
- A chartstring may consist of:
  - **Account**: Classifies the type of accounting transaction, i.e. office supplies, furniture, etc.
  - **Fund**: Explains the source of funds or the use of funds.
  - **Department**: Represents the cost center to which financial transactions are recorded.
  - **Program Code**: Identifies financial control points designated by UCOP (i.e. instruction).
  - **Chartfield 1 & Chartfield 2**: Identify activities or classify transactions for tracking that are important to the campus or department (i.e. Principle Investigator).
- If you need specific Chart of Account (COA) guidance, including understanding the proper usage of chartfields review the Chart of Accounts training materials.  

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2 Chart Of Accounts Information: [http://www.bai.berkeley.edu/BFS/BudgetGL/chartofaccounts.htm](http://www.bai.berkeley.edu/BFS/BudgetGL/chartofaccounts.htm)
**Necessary Documentation**

- Ensure that the Requisition complies with the **federal funding requirements** set forth by the ‘funding agency’ by reviewing and completing the Notes, Comments or Attachments.

**EXAMPLE: Equipment purchase**

1) Determine that no ‘like-kind’ equipment exists on campus and include this statement in the BearBuy Notes or Comments.

2) Verify that agency approval has been granted to purchase the equipment and include a statement like “(name of agency) approval has been granted to purchase the (name or type of equipment) equipment”.

3) Include a statement indicating whether the University or the Agency has title to the equipment.

- **FORMS**: include all of the necessary documentation in compliance with procedures/policies.

**EXAMPLE: After-the-Fact Form instructions refer to specific policies and documents.**

1) Include Price Reasonableness and Supplier Selection documentation to comply with procedures.

2) Confirm that required Verification of Insurance for Service related Requisitions under $5000 is included.

3) Attach the insurance certificate to the Requisition as an internal attachment, noting the UC Regents as ‘additional insured’.

**Encumbrances**

- An encumbrance is the name given to funds that have been reserved when a purchase Requisition is finalized; a Purchase Order is created and encumbered.

- When a Purchase Order is processed, funds are “placed aside” for that transaction. Those funds are no longer available for use in other transactions, but also have not been included in the Actual Funds balance because a payment has not yet been generated and the funds have not physically left the university.

- When the Supplier is paid, the encumbrance is reversed and the funds will appear under the Actual funds balance instead of as an Encumbrance balance.
**Tax Calculations**

- When the PO exports to BFS, sales tax associated to the Ship To Location will be applied so the encumbrance (see section above) accounts for sales tax.
- Example: If a department approved a Requisition for $4,999, when a tax rate of 8% is applied in BFS, the value will be $5398.92. Be aware of this difference when managing POs and running BAIRS reports on BearBuy POs in BFS.

<table>
<thead>
<tr>
<th>Item</th>
<th>Taxable?</th>
<th>Price</th>
<th>Ext Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>$4999.00</td>
<td>$4999.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total</td>
<td>$4999.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Taxable?</th>
<th>Price</th>
<th>Ext Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>$4999.00</td>
<td>4999.00</td>
</tr>
<tr>
<td>@ 8%</td>
<td></td>
<td>$399.92</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total</td>
<td>$5398.92</td>
</tr>
</tbody>
</table>

**Shipping**

- The **Ship To Address** is designated on the PO and is the location to which the purchased goods will be sent by the Supplier.
- If a department has central receiving the goods will be sent to the **Ship To Address** by the Supplier. The order will then be internally redirected by UC Berkeley Central Distribution and delivered to the **Final Destination Code**.
- The **Final Destination Code** is used internally at UC Berkeley for departments that have central receiving.
- When searching for a Ship To Address search by either building name or building physical address.

**Setting Up a Supplier**

- When a Supplier is not available for selection in BearBuy, a **UCB Substitute W-9 & Supplier Information** form must be completed and sent to the Vending unit within Supply Chain Management.
- Once the form is reviewed, approved and processed, the Supplier will be available for selection in BearBuy.
- For more information on Vending at UC Berkeley please visit the [Vending website](http://supplychain.berkeley.edu/programs/vending).
D. Shopping Catalogs

- Use Shop > Everything to search for hosted catalog items from preferred suppliers at University specific pricing.
- Use Advanced Search options to enter specific criteria including Product Description, Part Number, Supplier and/or Manufacturer Name and Key Word search.

**Hosted Catalogs**
1. Use Shop > Everything to begin shopping. Enter the item name and click Go.
2. You can use Filters (located on the left hand side) to reduce the number of search results.
3. From the search results, a list of products, the Product picture (if any), description and other detailed specifications are visible.
4. Use the compare link to compare multiple items. Once you have flagged desired items to compare, select Compare Selected.
5. Adjust the quantity and select Add to Cart to add desired items to your cart.
6. To access the shopping cart after adding an item, click the cart icon (top right banner).
7. To continue shopping click the BearBuy logo or Home/Shop icons.

**Punch-out Catalog**
- Punch-out catalogs connect to the supplier’s website branded for UCB with UCB specific pricing.
- Punch-out catalogs retain the look and feel of the regular public website; however the checkout process will result in the products being returned to BearBuy and added to the active shopping cart.
- Follow the supplier’s process for returning items back to BearBuy as each punch-out catalog may differ.
- To purchase an item from a Supplier that is not found in the catalog or punch-out, use the non-catalog form and include any quote or pricing information.
1. Select the supplier’s icon.
2. Search in the supplier’s catalog for items and add to supplier shopping cart.
3. Complete the shopping selected on supplier’s site, then return item(s) to BearBuy shopping cart.
E. Shopping Forms

Forms are used to purchase services or goods not found in a hosted or punch-out catalog.

Completing Forms
- You must complete all of the sections with bolded headers
- Select the Question Mark icon ( ) in the upper right hand corner of each section information on specific form sections
- Internal attachments: Attachments accessible to UCB individuals who have access to view transaction.
- External Attachment: Attachments will be sent electronically to the vendor AND is accessible to UCB individual who have access to view transactions.

Payment Request Form
An invoice is not required to process the order; however, the invoice is required before Accounts Payable processes payment to the vendor.
- Shoppers may submit incomplete forms for processing provided a supplier name (or Supplier Not Found) is selected.
  - The Requisition Creator is required to provide all documentation when creating a requisition based on the form, before payment can be issued.
  - Shoppers do not have access to student names and UCB employees.
- Each activity has different documentation requirements which should be scanned and attached to the Payment Request Form.
- Payment Requests will always require Requisition and Voucher (Org Node) approvals.
- The Purchase Order generated from a Payment Request From and will not be sent to the Vendor.

After The Fact Form
Policy/Guidelines
- After the Fact purchases are "unauthorized purchase" per UCOP Bus 43

When to use
- To pay for goods/services for which a PO has not previously been put in place but should have been.
- Each invoice should be submitted on a separate form. Each form on a separate cart.
- Do not complete this form for purchases that have already been paid using a bluCard.

Workflow
- Workflow follows the same workflow as the Payment Request Form.
- After The Fact Forms will always require Requisition and Voucher (Org Node) approvals
- After Requisition Approval a Voucher is created and reviewed by Accounts Payable prior to Voucher approval.

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4 UCOP Bus 43: http://policy.ucop.edu/doc/3220485/BFB-BUS-43
• Purchase Order generated from an After-the-Fact Form will not be sent to the Vendor.

**Non-Catalog Form**
• The non-catalog form should be used when you need to purchase goods not found in a BearBuy catalog.
• You may use this form to track or request purchases that will be paid with a bluCard.
  ○ A bluCard should be used for paying registration fees, one-time vendors, vendors not accepting PO’s, etc.

**Amount Only and Service Order Form**
• Used when the University enters into an ongoing service agreement with a vendor. The vendor will bill the department based on the agreed upon schedule with multiple invoices/payments.
• Example: Department wants to lease new copier machine. Lease agreement is for 5 years and the vendor will bill monthly.
• PO start/end dates should not exceed one fiscal year.
• Services are defined as labor performed for another, or useful labor that may or may not produce a tangible commodity.

<table>
<thead>
<tr>
<th>FORMS</th>
<th>SITUATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Only Form</td>
<td>Taxable, Non-service related orders (i.e. Copier lease agreement)</td>
</tr>
<tr>
<td>Service Order Form</td>
<td>Non-Taxable, Service related orders (i.e. equipment maintenance)</td>
</tr>
</tbody>
</table>

**Independent Contractor & Consultant Services Form**

**Independent Contractor**
• Must follow UCOP BUS 34 Policy
• Required Internal Attachments:
  ○ Conflict of Interest
  ○ Certificate of Insurance
  ○ Pre-Hire Worksheet
  ○ Selection Justification
• Required External Attachments:
  ○ Statement of Work

**Consultant Services**
• Must follow UCOP BUS 77 Policy
• Required Internal Attachments:
  ○ Copy of Contract Agreement signed by the Business Contract Office
• Required External Attachments:
  ○ Statement of work,
  ○ Estimate, or
  ○ Schedule

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5 UCOP BUS 34 Policy: [http://policy.ucop.edu/doc/3220478/BFB-BUS-34](http://policy.ucop.edu/doc/3220478/BFB-BUS-34)
F. Entertainment Purchases

**Definition:**
At UC Berkeley, "entertainment" means expenditures for meals or light refreshments and related services (e.g., labor charges, room rental, equipment rental, decorations, flowers, and similar expenditures).

**Policy**
- BUS 79 details all the entertainment related policy, rules and regulations.6
- In addition to completing the appropriate BearBuy form, the Entertainment Form must be attached at all times.

The table details which BearBuy form is appropriate to use when paying a specific type of Entertainment expense:

<table>
<thead>
<tr>
<th>Forms</th>
<th>Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Off- Campus Event</td>
<td>• Off-site retreat, rent space off campus, requires quote</td>
</tr>
<tr>
<td></td>
<td>• Risk management review for insurance and contract terms and contract sign-off</td>
</tr>
<tr>
<td>Payment Request</td>
<td>• Pay for catering after event</td>
</tr>
<tr>
<td></td>
<td>• Requires invoice as attachment</td>
</tr>
<tr>
<td>Service Order Request</td>
<td>• Vendor requires PO ahead of event, or deposit is required</td>
</tr>
<tr>
<td></td>
<td>• Requires quote/estimate</td>
</tr>
</tbody>
</table>

**Note:** Cart/Req. must have 2 lines: 1. Deposit; 2. Balance

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G. BearBuy Navigation

Below is an overview of the BearBuy Home/Shop page and key items to review when logging in. The left side panel contains important news and information.

1. UC BearBuy Logo
2. User Information
3. Bookmarks
4. Action Items
5. Notifications
6. Cart Preview
7. "Shop at the Top"
8. Home Shop
9. Shop Menu
10. Order & Documents
11. Catalogs and Contracts
12. Accounts Payable
13. Supplier Management
14. Menu Search
15. BearBuy News
16. Frequently Used Forms
17. Campus Related Services
18. Collapsible Catalog Categories

**Home:** Click on the icon to return to the BearBuy Home/Shop page.

**Shop:** Shopping menu and tasks including shopping page, forms, carts and orders.

**Orders and Documents:** Menu for Document Search and My Approvals sub-menu.

**Catalogs and Contracts:** Menu for Contract Management, hosted catalog content, pricing and configuration.

**Accounts Payable:** Menu for Accounts Payable Dashboard, Invoices and Receipts.

**Supplier Management:** Menu Supplier Management.

**Menu Search:** Keyword search with clickable results.

**Quick Search:** Click to access the Quick Search Menu.

**Bookmark:** Click on the icon to view or edit your bookmarks and to create a new bookmark.
H. Cart Management

**Active Cart vs Draft Cart**

**Active Cart**
- An active cart is a cart you are currently adding items to.
- You can access your active cart by selecting **View My Cart** from the cart preview option on the top banner.
- Your active cart states:
  - The Cart Name
  - The items you have currently added to your shopping cart (broken out by vendor)
  - The cart total

**Draft Cart**
- There are four draft cart sections: **My Returned Requisitions**, **My Drafts**, **Drafts Assigned to Me**, and **My Drafts Assigned to Others**. If you do not have any carts in these categories then the section will not appear.
- To access your draft carts, navigate to **Shopping** > **My Carts and Orders** > **View Draft Shopping Carts**
- When the Cart is selected, it will become your Active Cart, and will be listed under **My Carts and Orders** ⇒ **Open My Active Shopping Carts**. Select the icon to make any cart the active cart which will allow you to edit the cart.
My Returned Requisitions: Requisitions that have been returned. Action is required, the Cart can be edited and the requisitions can be re-submitted again.

My Drafts: Carts you are currently working on. The icon denotes the active cart you are working on. The icon denotes an available cart. Only one cart can be active at one time.

Drafts Assigned to Me: Carts that have been assigned to me. These require your action.

My Drafts Assigned to Others: Lists carts that you have created and have assigned to someone else (Cart Authorizer).

**Updating and Editing Cart Items**

- After navigating to your Active Cart, select the appropriate line by checking line checkbox (✓).
- From the *For selected line items* drop-down menu you can:
  - Add to favorites,
  - Remove Selected items,
  - Remove All Items
  - Move to Another Cart
  - Add to Draft Cart or Pending PR/PO
  - Add to PO Revision
  - View Line Item History or
  - Change Commodity Code.

**Cart naming convention**

- Your department may have a specific way of naming carts. We suggest you contact your department manager to confirm your department’s cart naming convention (if any).
Assigning a Cart
1. In your active cart, click Assign to select the desired Cart Authorizer.

2. After clicking Assign you will Search for an assignee and you can also enter a comment for the Cart Authorizer. Select Assign. BearBuy sends an email notification to the assignee.

Unassigning a Cart
Assigned carts can be unassigned if you need to make changes. Submitted Carts cannot be Unassigned.
1. Navigate to Shopping > My Carts and Orders > View Draft Shopping Carts and locate the cart.
2. Select Unassign. The cart will be returned to your Draft Carts list.

Reassigning a returned Cart
- A cart may be returned to you if it is missing accounting information, incorrect items being ordered, etc.
- All returned carts will appear under your View Draft Shopping Carts ⇒ Shopping Carts - Drafts and displayed under the My Returned Requisitions section. To edit your returned cart simply:
  1. Select the Shopping Cart Name (doing so, moves the cart to your Open My Active Shopping Cart page).
  2. Make the corrections needed and when ready to reassign, simply click Assign Cart.

Deleting a Cart
To delete a cart simply navigate to View Draft Shopping Carts ⇒ Shopping Carts - Drafts. Click Delete next to the cart.
I. Cart Details (Requisition Info)

Once you have added items to your cart, there are two ways you can View Cart Details.

**Option 1:** From the cart preview, select the Checkout button.

**Option 2:** When viewing your active cart, select View Cart Details.

**Summary**

The Summary tab of the Requisition contains the cart’s financial information at a glance.

- Org Node
- Shipping
- Billing
- Buyer Information
- Accounting Codes (only header values)
- Internal and External Notes and Attachments
- Supplier/Line Details

**Shipping**

1. Navigate to the Requisition>Shipping sub-tab and click Edit.
2. The Ship To addresses window appears. Select the desired address in the Shipping Address section. Click the ‘To choose a different address click here’ link.
3. The link will refresh. Click select from org addresses.
4. From the Address Search popup, enter the Nickname or Address Text for the desired address. When selecting an on-campus location, search by building name. When selecting an off-campus location, search by building address number.
5. From the list of results, click the [select] link for the desired address.
6. Once selected, the Address Details window is shown. To confirm the Address click the Save button.
Chart Of Account (COA) Codes
As a Shopper you should verify any chartstring or budget information with your budget or department Manager.

Single Chartstring Entry
1. The Accounting Codes sections displays information, such as Account, Fund, Dept, and Program Code. These will appear with an error (△) at the top of the page when any of these fields are missing.

2. Validate or complete the appropriate funding information (make sure to Save all your changes).

COA Split By Amount
• Split at the header will apply to all PO line. Once a split at the header COA is performed, no future splits at the line level can occur. If you must remove the split at header.
• COA split at the PO line will only apply to the individual PO line.
• If requisition contains more than 1 PO line, do not split by amount at the header.

1. Navigate to the Requisition>Accounting Codes sub-tab and select edit.

2. The Chart of Accounts (COA) information from the Accounting Codes header is displayed. Use your scroll bar to navigate to the right of the row. Click Add Split.

3. An additional row has been added for the line and the COA information copied down.

4. Scroll to back to the add split link and select a Split By option (% of Price, % of Quantity, Amount of Price).
5. Once you’ve selected your **Split By** option and entered the values, navigate to the second distribution line and make any COA changes.

6. Select **Save**.

![Save and Cancel buttons]

**Comments and Attachments**

Internal and External Notes and Attachments can be added to the Requisition and remain with the Requisition/Purchase Order indefinitely.

1. In the **cart details**, navigate to **Requisition> Summary** sub-tab and scroll down to the **...Notes and Attachments** section.
2. Select the **add notes** or **add attachment...** link. Add file or URL.
3. Click **Save**.

**Comments** can be added through the comments tab.

1. In the **cart details**, navigate to **Comments** tab and select **Add Comment**.

![Comments tab]

2. Enter your **comment** in the available text box.
3. You can also attach additional documents through the comments by clicking on the **Browse** button.

![Comment editing window]

4. Select **Add Comment**.
J. Receiving

- In BearBuy, there is a Receiver role that has to be requested through SARA; however, at this time, SPH has opted not to use the Receiver role, but to take a more simplified approach to receiving in BearBuy.
- At SPH, Shoppers are responsible for the receiving function.
- If a good or service is not directly received by the Shopper, it is the Shoppers responsibility to reach out to the recipient of the good/service and confirm that the good was received or service provided.
- Once the recipient has confirmed receipt, the Shopper can search for the BearBuy requisition or purchase order related to the purchase and add a comment to either the requisition or purchase order with the words: “received, okay to pay”.
- CSS will use this acknowledgement as an indicator that payment can be released to the vendor.
- If a packing slip is received, this document should be scanned and attached to the purchase order or requisition.
K. Document Search

About
Document Search is a tool in BearBuy used to search for Requisitions, Purchase Orders, Receipts and Vouchers. You can perform a simple search or an advanced search.

Search Terms
Document search provides a simple search interface where you can search across all document types and receive all related Requisitions, Purchase Orders, Receipts and Invoices in the search results, such as:

- requisition number
- requisition name
- purchase order number
- catalog number (SKU)
- contract number
- supplier invoice number
- voucher number
- receipt number
- receipt packing slip number
- supplier name
- receipt tracking number
- receipt name
- Cart name
- product description

Simple Search
1. Navigate to Orders & Documents> Document Search>Search Documents

2. On the resulting window:
   a. Use Search ⇪ All Documents to specify whether you are searching All Documents, or specific documents such as a Requisition, Purchase Order, Receipt or Voucher.
   b. Use the Search field to enter information related to your search.

3. Click Go.

Advanced Search

2. Select the advanced search link below the search bar.

3. The Search Criteria includes Requisitions, Purchase Orders, Receipts and Vouchers.
   a. For each selection, the advanced search fields will update to show those relevant for the document type being searched.

4. There are also options for the Custom Fields (i.e. Fund, Buyer, Org Node Code, etc).

5. Click Go to search.
Filtering your Document Search Results

1. Use the **Refine Search Results** choices to filter by criteria such as **Date Range**, **Supplier**, **User** and **Workflow** status.
   a. To select multiple values for a desired filter, click the 📋 filter icon.
2. Select the desired values by marking the checkbox, and then click the **Apply** button. Results are shown.

Saving a Document Search

1. From the **Document Search** result, navigate to the **Filtered By** section.
2. Select the **Save Search** button
3. Enter a **Document Search Nickname**.
4. Select the **Destination Folder** to save the search within.
   a. To create a new folder, select the **New** icon.
   b. Select either **top level personal folder** or **top level shared folder**.
   c. Enter a **Destination Folder name** and **description** and save.
5. Once destination folder is selected, click **Save**.

Export a Document Search

1. From the **Document Search** result, navigate to the **Filtered By** section.
2. Select the **Export Search** button.
3. Enter **file name** and **description**.
4. Select the export template
   a. **Screen export**
   b. **Transaction export**
   c. **Full export**
5. Select **Submit**.
6. Your export is queued up. When ready to download, it will be located within the **Action Items top banner section**.
L. Additional Resources & Support

**BearBuy**
- The BearBuy Training site is the source for the most up to date news and announcements.
  - [http://supplychain.berkeley.edu/bearbuy](http://supplychain.berkeley.edu/bearbuy)
- More Training Resources are available for you at
  - [http://supplychain.berkeley.edu/bearbuy/instructional-resources](http://supplychain.berkeley.edu/bearbuy/instructional-resources)
- BearBuy YouTube Channel
  - [youtube.com/user/BearBuyProcurement](http://youtube.com/user/BearBuyProcurement)
- Need more assistance? Contact the BearBuy help desk!
  - (510) 664-9000 Option 1, Option 2
  - Mon-Fri 8 AM to 5PM
  - Email BearBuy Help (bearbuyhelp@berkeley.edu)

**Other Supply Chain Management Units**
- Vendoring
  - [http://supplychain.berkeley.edu/programs/vendoring](http://supplychain.berkeley.edu/programs/vendoring)
- Procurement Buyers
  - [http://supplychain.berkeley.edu/programs/campus-buyer](http://supplychain.berkeley.edu/programs/campus-buyer)

**Controller’s Office – Accounts Payable**
- Accounts Payable website (formerly known as Disbursements)
  - [http://controller.berkeley.edu/departments/accounts-payable](http://controller.berkeley.edu/departments/accounts-payable)
Appendix A: High Level Workflow Map for SPH (CQADM & CPACA)