



20.3 New Feature Review

November 2020

Reminder: BearBuy Unavailable

BearBuy production downtime will take place between **Friday, November 6, at 6 p.m. through Sunday, November 8, at 9 a.m.** to upgrade from release version 20.2 to 20.3.

BearBuy will be available on **Monday, November 9.**

What to expect during the outage:

- BearBuy will not be available
- Please complete all BearBuy requests prior to the outage

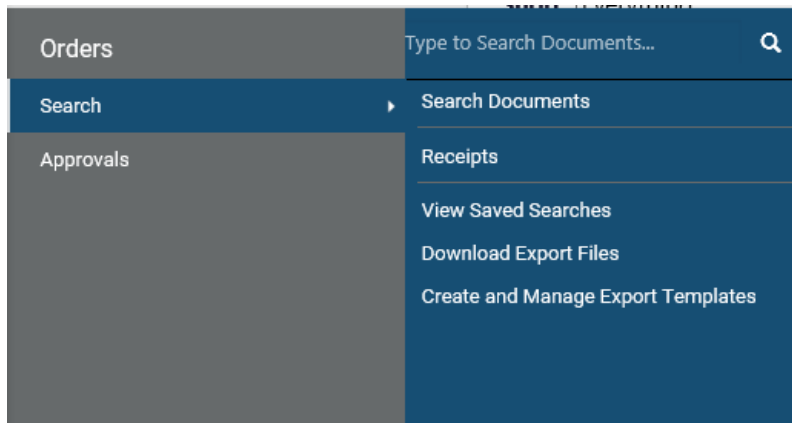
Enhancements in this Release

- Enhanced Document Search
 - Updated search experience with new layout
 - Focus on simplifying searches and customization of search filters
 - Streamlined display and easy to use interface

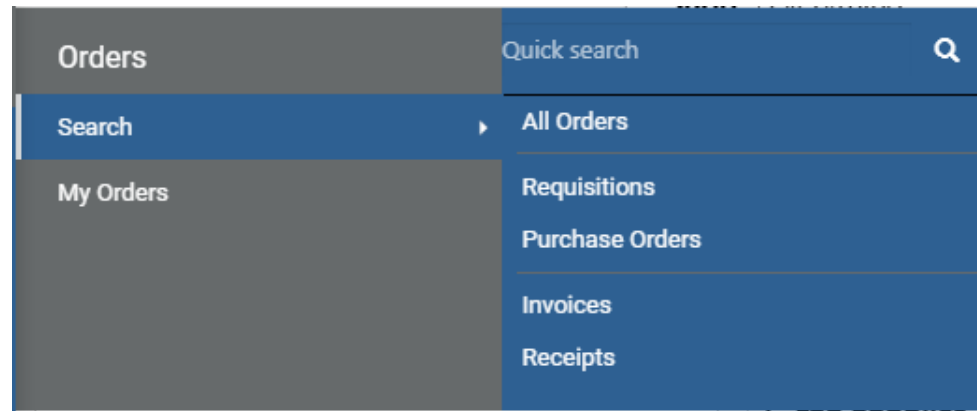
Enhanced Document Search: Navigation Menu Changes

Previously, in the side bar menu you could navigate to Orders > Search > Search Documents to perform a simple or advanced document search. With 20.3, Orders menu navigation has been updated with document options such as Requisitions, Purchase Orders or Invoices.

Before 20.3:



After 20.3:



Note: navigation to View Saved Searches and Download Export Files has been moved to the User Profile

Enhanced Document Search: Layout

Before 20.3, simple Document Search:

The screenshot shows a web application interface for document search. At the top, there is a navigation bar with the BearBuy logo, user information, and search options. Below this, a search panel is displayed with the following sections:

- Search:** A dropdown menu set to "All Documents" and a "simple search" button.
- General Document Identification:** A text input field for "Document Number(s)".
- Document Information:** Fields for "Participant(s)" (radio buttons for "Any", "Me", "Pick..."), "Owner", "Date" (dropdown for "All Dates"), "Total Amount", and "Supplier".
- Item/Product Information:** Fields for "Catalog Number(SKU)", "Product Description", and "Product Flags" (checkboxes for "Controlled substance", "Energy Star", "Green", "Hazardous material", "Rad Minor", "Radioactive", "Recycled", "Select Agent", "Toxin").

At the bottom, a breadcrumb trail reads "Go to: simple search | my requisitions | my purchases".

After 20.3, new and improved layout:

The screenshot shows the updated web application interface. It features a more modern layout with a sidebar for filters and a main content area for search results.

Search All Orders

Quick Filters | My Searches

Supplier

- AGILENT TECHNOLOGIES, INC (62)
- BIO WORLD LAB ESSENTIALS (36)
- PACIFIC AIR TECHNOLOGY (26)
- OFFICE DEPOT (19)
- THOMAS SCIENTIFIC LLC (17)
- See More | Show More

Search filters: Type of Order: All | Created Date: Last 90 days | Quick search | Add Filter

Clear All Filters

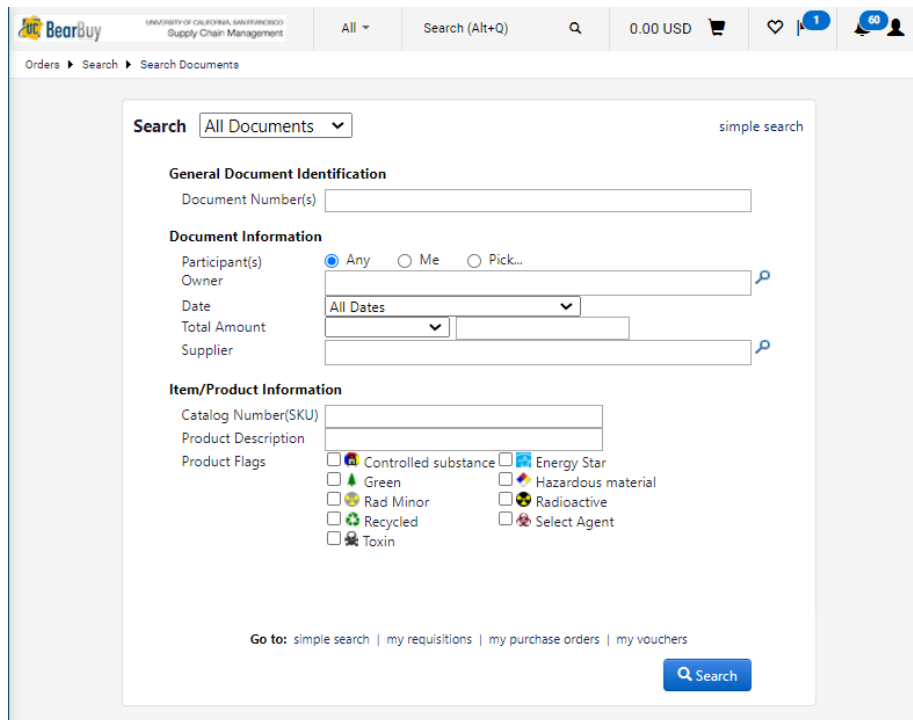
Page 1 of 2 | 1-150 of 282 Results | 150 Per Page

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
<input type="checkbox"/> 3100814	Requisition	Pending	Amy Approver1 Ray Requester1	10/30/2020 5:47:40 PM	-	ABC AUTOMOTIVE	750.00 USD
<input type="checkbox"/> 3100723	Requisition	Pending	Amy Approver1 Ray Requester1	10/30/2020 5:37:36 PM	-	ABC AUTOMOTIVE	750.00 USD

All Documents to All Orders

Searching for *All Documents* has been renamed *All Orders* with new functionality that focuses on searching for multiple document types at once.

Before 20.3:



The screenshot shows the BearBuy search interface. At the top, there is a navigation bar with the BearBuy logo, 'UNIVERSITY OF CALIFORNIA, SAN FRANCISCO Supply Chain Management', and a search bar containing 'Search (Alt+Q)'. The main content area is titled 'Orders > Search > Search Documents'. A search dropdown menu is set to 'All Documents'. Below this, there are three sections for search criteria: 'General Document Identification' with a 'Document Number(s)' field; 'Document Information' with fields for 'Participant(s)' (radio buttons for 'Any', 'Me', 'Pick...'), 'Owner', 'Date' (dropdown set to 'All Dates'), 'Total Amount', and 'Supplier'; and 'Item/Product Information' with fields for 'Catalog Number(SKU)' and 'Product Description', and a 'Product Flags' section with checkboxes for 'Controlled substance', 'Green', 'Rad Minor', 'Recycled', 'Toxin', 'Energy Star', 'Hazardous material', 'Radioactive', and 'Select Agent'. At the bottom, there is a 'Go to:' navigation bar with links for 'simple search', 'my requisitions', 'my purchase orders', and 'my vouchers', and a blue 'Search' button.

Prior to 20.3, when searching across all document types (Requisition, Purchase Order, Invoice) there were limited options for search criteria available to reduce the search results.

All Documents to All Orders

With 20.3, after navigating to Orders > Search > All Orders, multiple order types can be selected and additional filters can be added to refine the search results. As you add filters and click Apply, the search results will automatically update to match your criteria.

After 20.3:

The screenshot shows the 'Search All Orders' page in the BearBuy system. A dropdown menu is open for 'Type of Order', with the following options: Change Request (unchecked), Invoice (checked), Purchase Order (checked), Receipt (unchecked), and Requisition (checked). The background shows a table of search results with columns for Order ID, Status, Order Owners, Created Date/Time, Completed Date, Supplier, and Total Amount.

Order ID	Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
3100814	Pending	Amy Approver1 Ray Requester1	11/3/2020 9:14:18 AM	-	HOTEL INDIGO ATHENS	1,000.00 USD
3100723	Pending	Amy Approver1 Ray Requester1	10/30/2020 5:47:40 PM	-	ABC AUTOMOTIVE	750.00 USD
3100723	Pending	Amy Approver1 Ray Requester1	10/30/2020 5:37:36 PM	-	ABC AUTOMOTIVE	750.00 USD

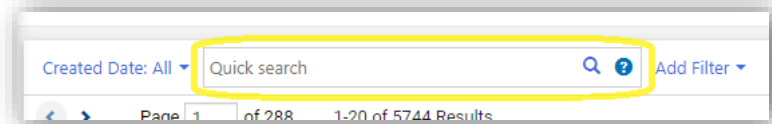
Best Practice is to search for the specific order type from the navigation menu such as Requisitions or Purchase Orders to ensure access to all filters.

Quick Search Enhancements

Quick search provides a faster way to perform searches. There are new features to refine your simple search such as a combined search or excluding words in a search.

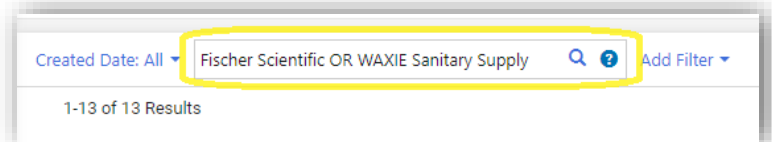
Perform a Quick Search

- Quickly search for a keyword or phrase in the Quick Search field without adding a filter
- Matching documents are returned in the search results



Combine Search

- Use “OR” between a search - For example, Fischer Scientific OR WAXIE Sanitary Supply



Exclude Words from a search

- Use “-” to limit search results – For example,
- Johns –Johnson



Search Criteria Fields to Filters

Prior to 20.3, Document Search displayed multiple search criteria fields at once where results could be refined. With 20.3, search criteria fields are replaced with filters that can be searched, added on-demand and pinned for future use.

With 20.3:

The screenshot displays the 'Search Requisitions' interface. At the top, there are navigation options: 'Orders > Search > Requisitions'. The main header includes 'Search Requisitions' and action buttons: 'Save As', 'Pin Filters', and 'Export All'. Below the header, there are 'Quick Filters' and 'My Searches' sections. The main content area shows a table of requisitions with columns for 'Requisition Number', 'Supplier', and 'Requisition Name'. A search bar at the top right contains 'Submitted Date: Last 90 days' and a 'Quick search' field. A green circle highlights the 'Add Filter' button, and a green arrow points to it from the text below. A dropdown menu is open, showing a search bar 'Find search filter...' and two categories: 'Identifiers' and 'Dates'. The 'Identifiers' category includes options like 'Change Request No.', 'Contract Number', 'Ext. Requisition Number', 'PO Number', 'Requisition Name', and 'Requisition Number'. The 'Dates' category includes 'Accounting Date', 'Approved Date', and 'Completed Date'. The table below shows 1-102 of 102 results with columns for 'Requisition Number', 'Supplier', 'Requisition Name', 'Requisition Status', 'Submitted Date', and 'Total Amount'.

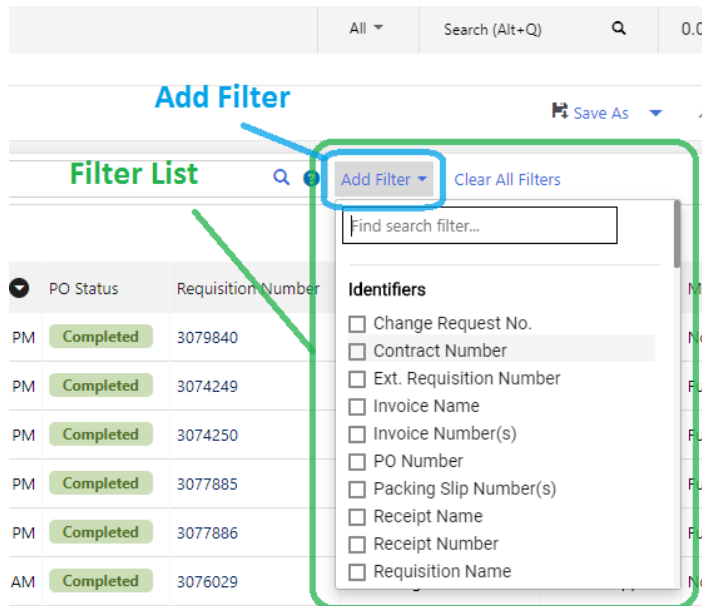
Requisition Number	Supplier	Requisition Name	Requisition Status	Submitted Date	Total Amount
<input type="checkbox"/> 3100814	ABC AUTOMOTIVE	2020-10-30 amy_approver1 01	Pe	0/2020	750.00 USD
<input type="checkbox"/> 3100723	ABC AUTOMOTIVE	2020-10-30 amy_approver1 01	Pe	0/2020	750.00 USD
<input type="checkbox"/> 3079840	CDW-GOVERNMENT	CDW-G Deliver To Line Test	Co	5/2020	18.00 USD

Click **Add Filter** to further refine your search results.

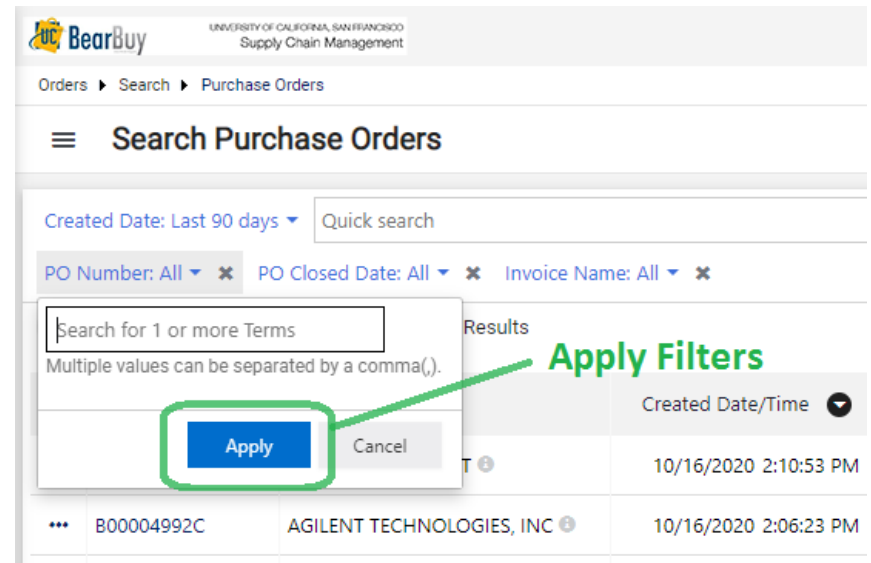
Add and Apply Filters

Filters are added via a drop-down list which is also searchable. Available filters differ depending on the Document type (e.g. PO Status, Invoice Status, etc.).

To add a filter, click **Add Filter**, search to find a filter, click the box next to the filter to add. Once the filter is added, specify the filter value and click **Apply**.



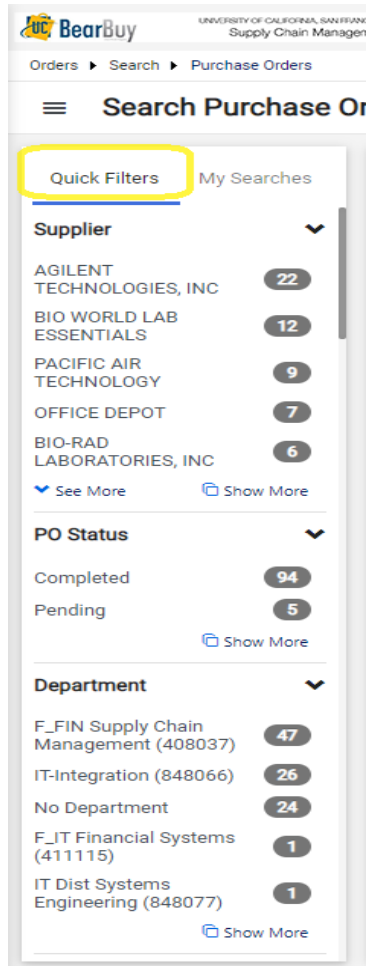
Select **Add Filter** to view Available Filters and click the box to add the specific filter



After selecting a filter, specify filter values and click **Apply**

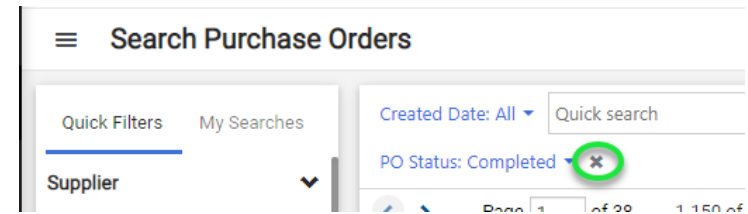
Supply Chain Management

Quick Filters



Quick Filters are commonly used filters accessible depending on the Document type (e.g. PO Status, Invoice Status, etc.).

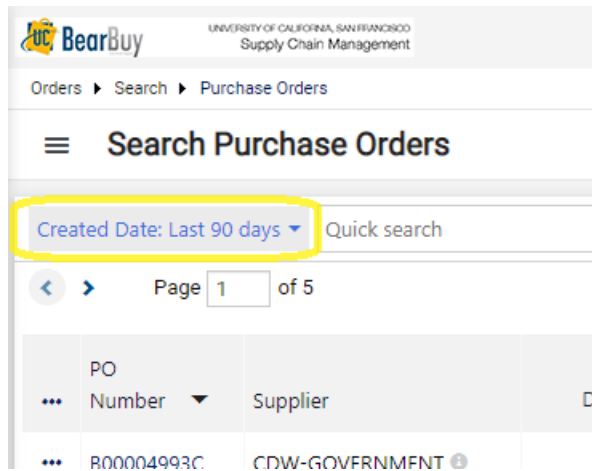
- Click ☰ to display the available Quick Filters
- Click on the filter you would like to add
- The quick filter will be added to the search and the results will be updated



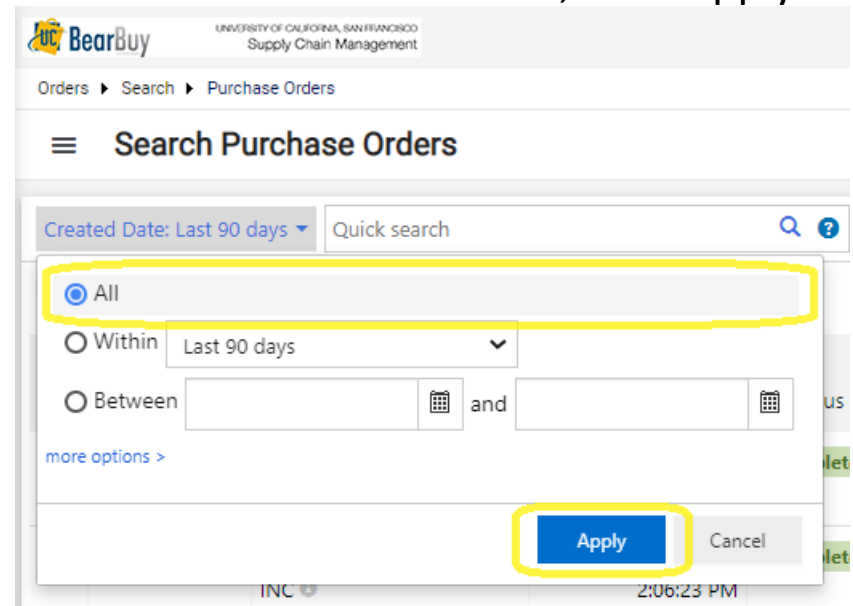
- To remove the quick filter from your search, click the x

Date Filter Default

The Date filters default to **Last 90 days**. Please note that search results will only appear for transactions that meet the last 90 days criteria unless the filter is changed. The date filter can be changed to different date criteria or select All, then Apply.



Select **Created Date** to view filter options

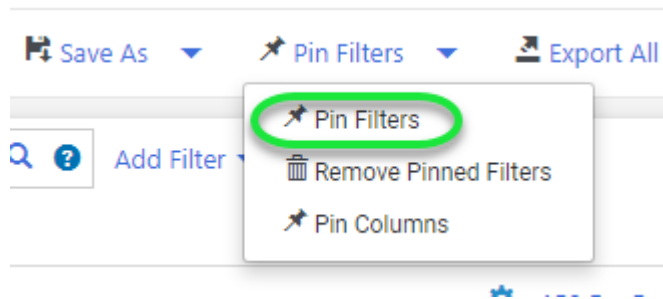


Select **All** and click **Apply**

Best Practice is to change Created Date to All as your first step when performing a search unless the Last 90 days meets your needs.

Date Filter Default

Once you have updated the Date filter to All or perhaps other date criteria, the date criteria can be updated to the default value by navigating to Pin Filters and select Pin Filters.

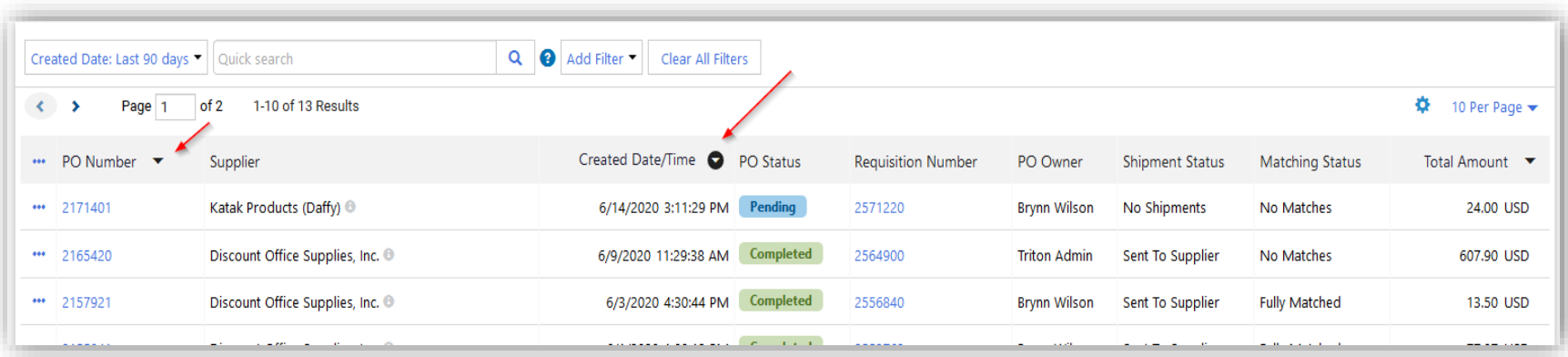


Once you select Pin Filters, you will be prompted to confirm the search filter which will then become the default layout for new searches on this page each time you return.

Sort Search Results

Search results can be sorted by any of the columns indicated with the sort icon ▲

The column used for sorting is indicated in a circle icon ●



PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
2171401	Katak Products (Daffy)	6/14/2020 3:11:29 PM	Pending	2571220	Brynn Wilson	No Shipments	No Matches	24.00 USD
2165420	Discount Office Supplies, Inc.	6/9/2020 11:29:38 AM	Completed	2564900	Triton Admin	Sent To Supplier	No Matches	607.90 USD
2157921	Discount Office Supplies, Inc.	6/3/2020 4:30:44 PM	Completed	2556840	Brynn Wilson	Sent To Supplier	Fully Matched	13.50 USD

Search Results Columns

With 20.3, the search results columns can be configured to customize what data the search results display. In addition to easier viewing, this allows document search screen exports with customized data.


Before 20.3

PO No	Supplier	Creation Date/Time	Requisition No.	Owner	Supplier Status	Settlement Status	PO Total
✓ B001980670	SCM COVID STORE	10/27/2020 12:11 PM	137375757	Robin Ippisch	Sent	Fully Invoiced Fully Matched	30.06 USD
✓ B001980558	SCM COVID STORE	10/27/2020 10:42 AM	137356120	Rich Liang	Sent	Fully Invoiced Fully Matched	48.90 USD
✓ B001980556	SCM COVID STORE	10/27/2020 10:41 AM	137347032	Amber Rivera	Sent	Fully Invoiced Fully Matched	16.02 USD


After 20.3

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Buyer Email	AP Status	Matching Status	Total Amount	Approval Steps	Shipment Status
800004993C	CDW-GOVERNMENT	10/16/2020 2:10:53 PM	Completed	3079840	Leslie Siegmund - Local	-	Open	No Matches	18.00 USD	-	Sent To Supplier
800004992C	AGILENT TECHNOLOGIES, INC	10/16/2020 2:06:23 PM	Completed	3074249	Lian Sussmann - Local	-	Open	Fully Matched	25.50 USD	-	No Shipments
800004991C	AGILENT TECHNOLOGIES, INC	10/16/2020 2:05:53 PM	Completed	3074250	Lian Sussmann - Local	-	Open	Fully Matched	4,000.00 USD	-	No Shipments

Configure Search Results Columns

On the Search Results page, click the Configure Columns  icon located on the right display on the search results page.

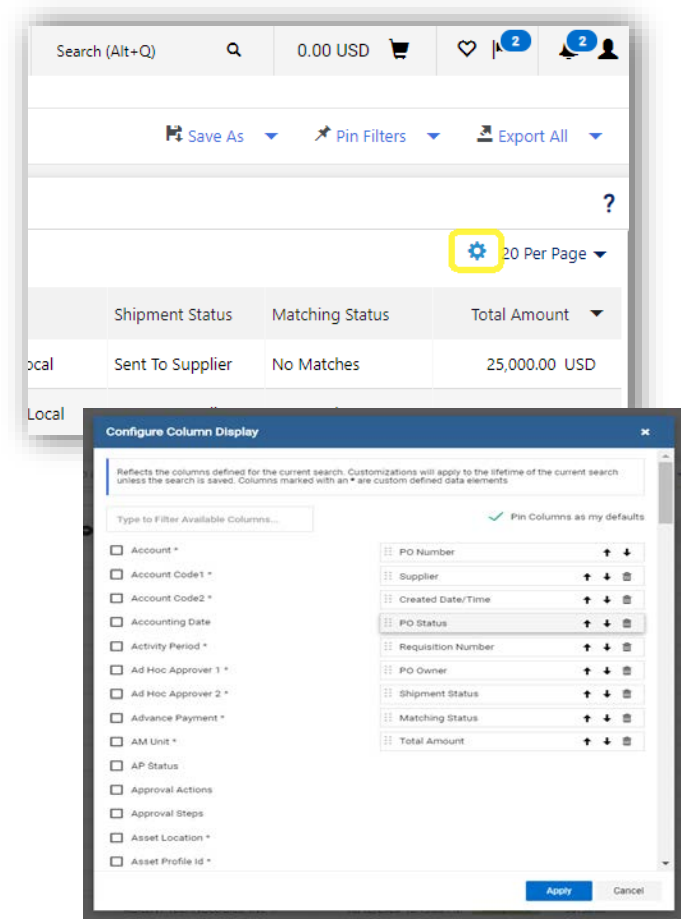
To add or delete columns:

- Add a column - locate the column(s) by scrolling through the list or entering a value in the search field. Click the checkbox for each column you would like to add from the available column list.
- Manage column display order - within the Configure Column Display, click and drag the columns to the selected location or use the  to move the columns up and down. Click Apply.

By default, the updated selected and sorted columns only display for the life of the current search.

Note: If you would like to keep the column configuration for all searches of this type going forward, select the **Pin Columns as my defaults** checkbox.

Pin Columns as my defaults

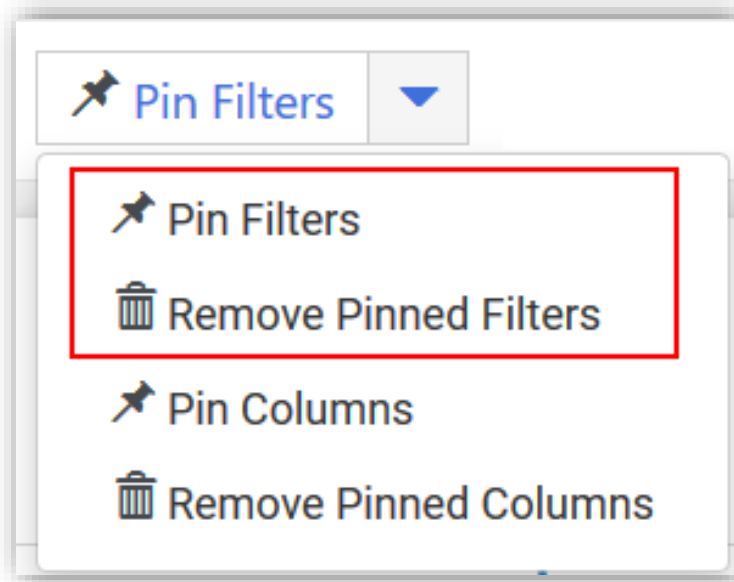


Supply Chain Management

Pin Filters & Pin Columns

Use **Pin Filters** and **Pin Columns** to keep the filter/column configuration as the default for all searches of this type going forward.

Each time you return to the search page, the pinned items will be applied by default. You can still add/remove filters and reconfigure columns.



Pin Filters and Columns by selecting the option in the **Pin Filters** dropdown above search results.

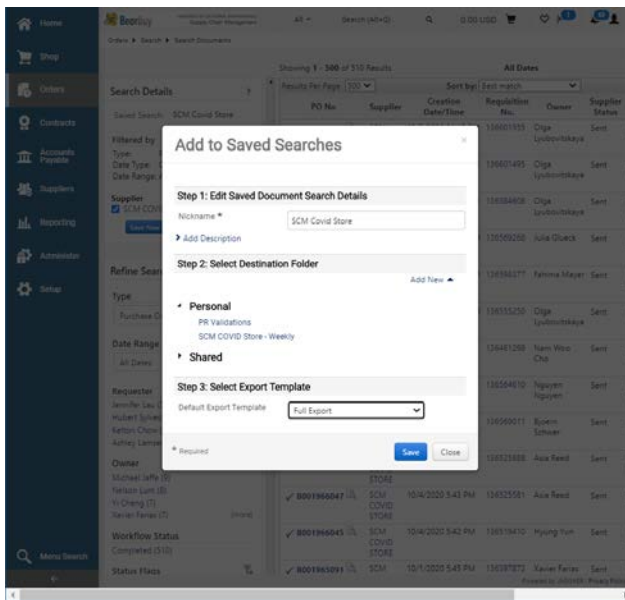
To remove the pinned items, select the **Remove Pinned Filters/Columns** option.

The remove option only displays if you have pinned items.

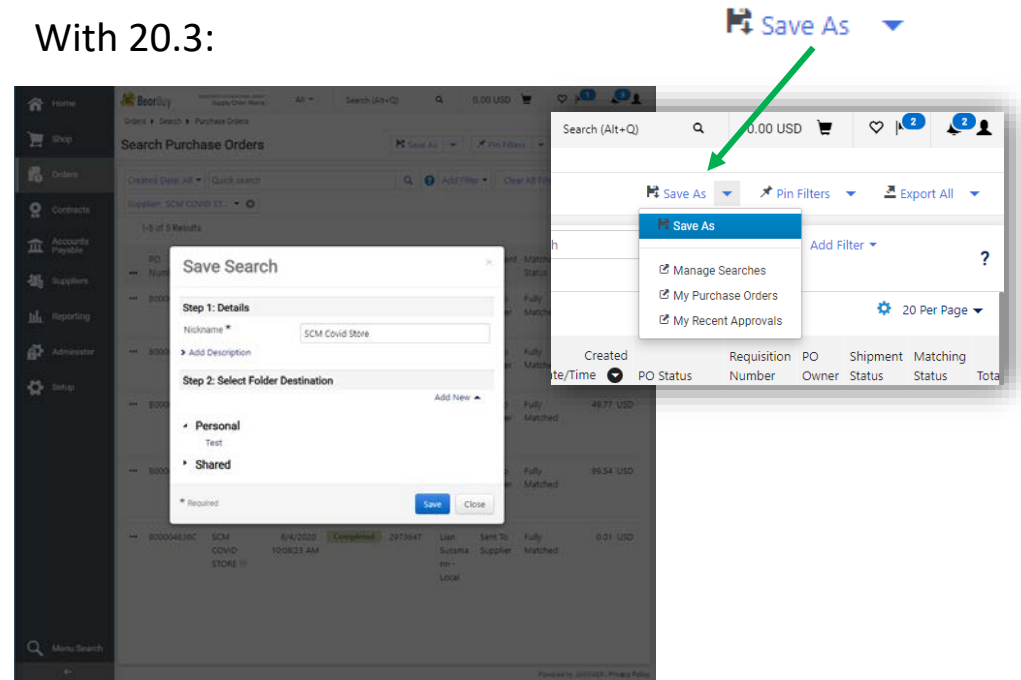
Saved Searches – Creating a Saved Search

Creating saved searches is very similar to the existing functionality. After adding filters, click **Save As** to save your search.

Before 20.3:



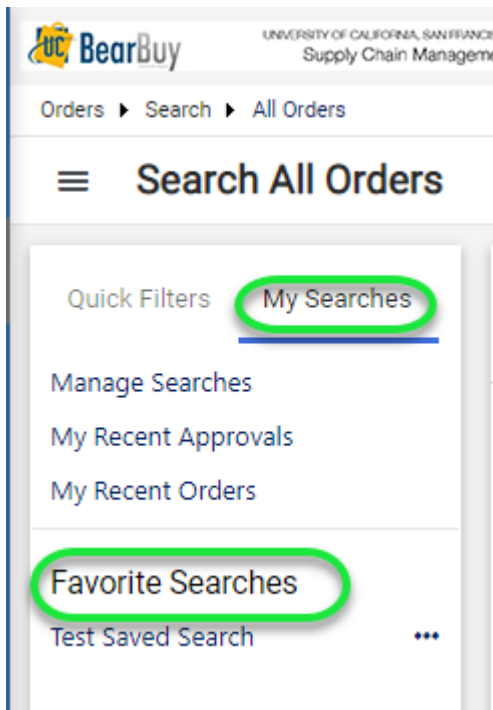
With 20.3:



Once you have added the desired filters and search parameters to your search, click **Save As**, add a name to the Saved Search, and select the search folder to add it to.

My Searches

The **My Searches** tab provides access to Saved Searches, Favorite Searches for recently used saved searches, Recent Orders and Recent Approvals.

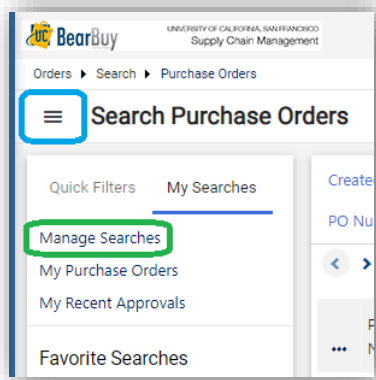


Click ☰ to access My Searches.

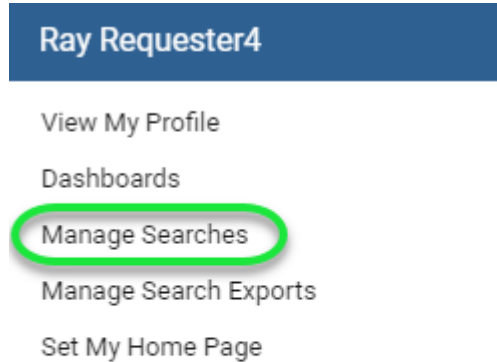
To run a Saved Search, simply click on the name of the saved search. Once you click on the saved search, the associated filters will appear and search results will be displayed.


Saved Searches – Accessing Saved Searches

The **Manage Searches** page provides a view of all saved searches and can be accessed from **My Searches** or listed under the user profile.

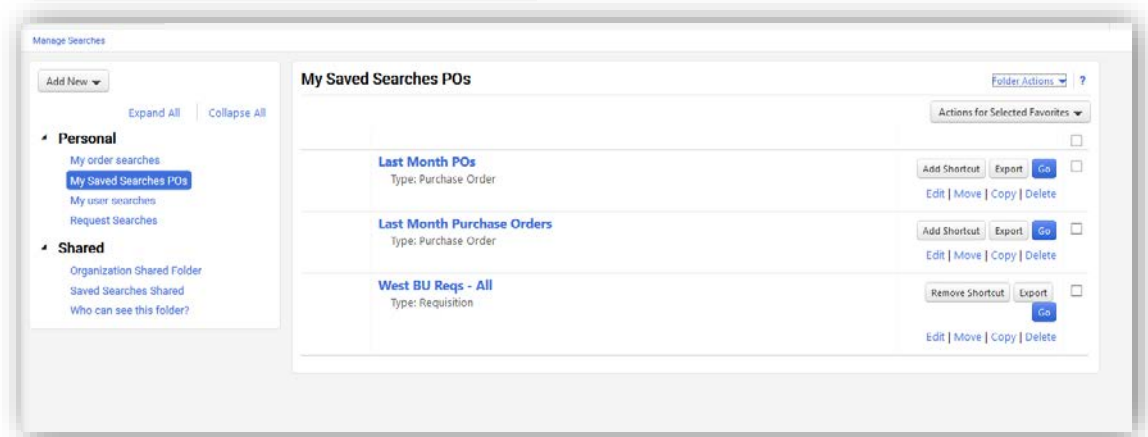


OR



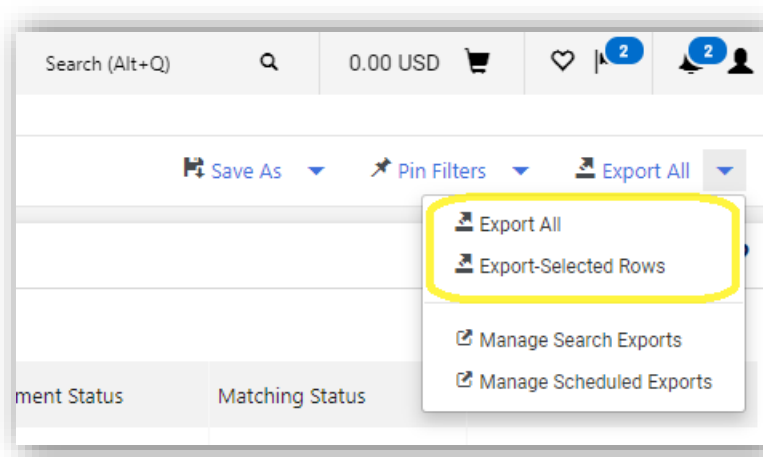
Navigate to the User Profile  dropdown > **Manage Searches**.

Click the ☰, My Searches and select **Manage Searches**.

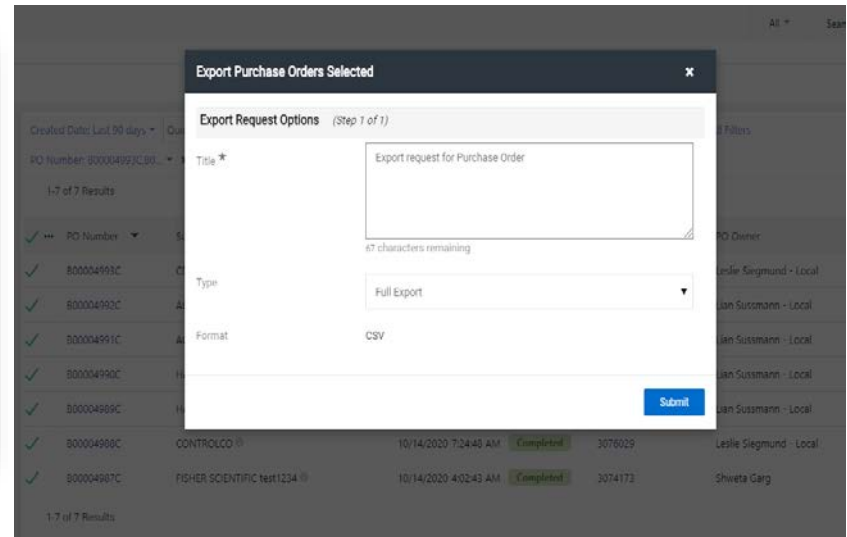


Export Search Results

Exporting search results with 20.3 is similar to the current functionality. When viewing your search results, navigate to the Export All pull-down and click the relevant Export option to export all results or only selected rows.



Click the drop down for **Export All** or **Export Selected Rows**.



Add a Title, Choose Export Type, Click **Submit**

Export Search Results – Manage Exports

After exporting document search results, the file is available on the **Manage Search Exports** page which can be accessed from the user profile or by selecting **Manage Search Exports** from the **Export All** dropdown on the search results page.

The screenshot illustrates the process of accessing the 'Manage Search Exports' page. On the left, a user profile for 'Sam Shopper4' is shown with a navigation menu where 'Manage Search Exports' is highlighted with a green circle. An 'OR' indicates an alternative path: from the search results page, clicking 'Export All' opens a dropdown menu where 'Manage Search Exports' is also highlighted with a green circle. Below this, the 'Manage Export Requests' page is shown, featuring a table with columns for Title, Status, Search Type, Export Output, Created, Completed, Available Until, Details, and Actions.

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Widget orders	Completed	Sales Order	Full Export (CSV)	7/8/2019 5:46:15 PM	7/8/2019 5:46:23 PM	7/15/2019	Total Records: 4	Delete
Export request for Sales Order	Error	Sales Order	Full Export (CSV)	7/7/2019 9:18:38 PM	-	7/14/2019		Delete

BearBuy Browser Requirements

- BearBuy is **only** supported on the following browsers and versions:
 - Internet Explorer (IE) 11
 - Firefox - latest version
 - Chrome - latest version
 - Safari - latest version

Resources

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

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

Additional Questions

For Supply Chain Management support, contact the SCM Response Team between 8 a.m. – 4 p.m. using the intake form:

- UCSF Faculty, Staff & Students (via MyAccess):
<https://ucsf.service-now.com/ess/scm>



Thank you!