20.3 New Feature Review

November 2020

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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

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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:
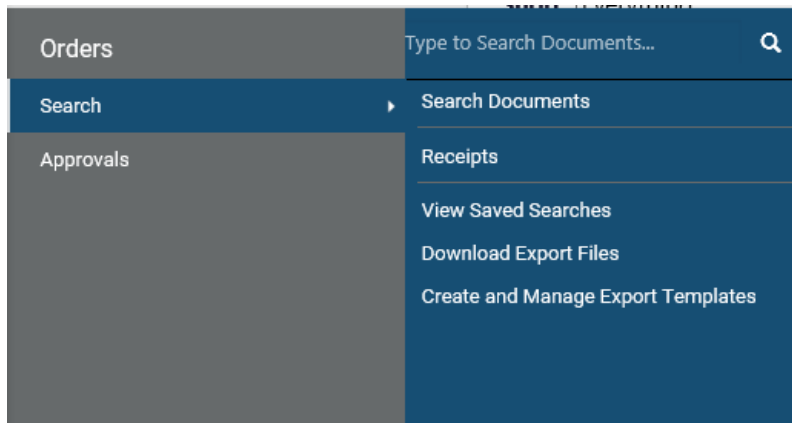
After 20.3:
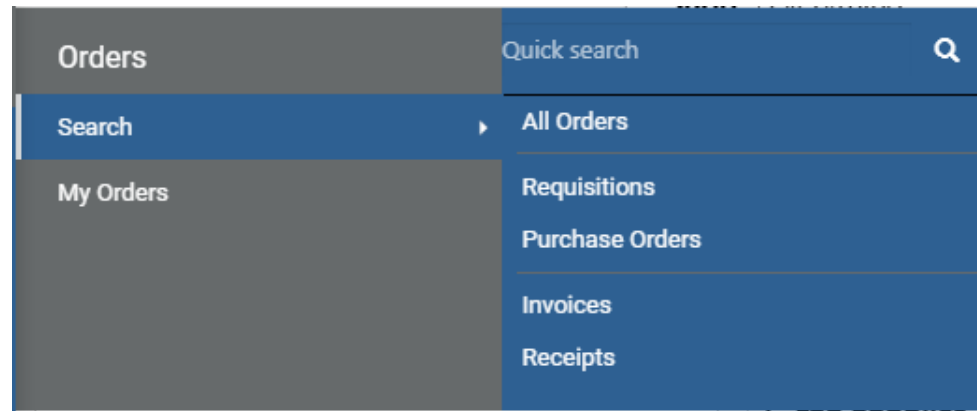
Note: navigation to View Saved Searches and Download Export Files has been moved to the User Profile

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Enhanced Document Search: Layout

Before 20.3, simple Document Search:

After 20.3, new and improved layout:

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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:

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.

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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:

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.

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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
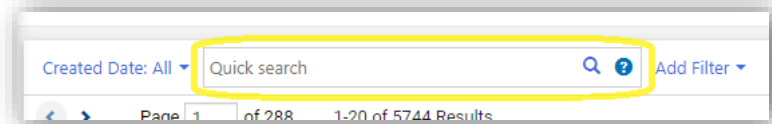
Combine Search

- 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

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Search Criteria Fields to Filters

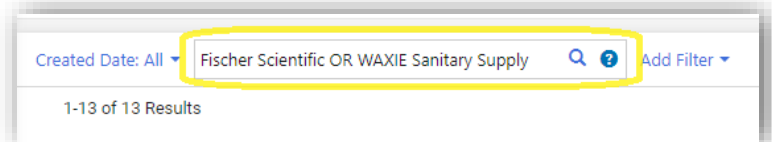Prior to 20.3, Document Search displayed multiple search criteria fields at once where results could be refined. With 20.3, search criteria fields are replaced with filters that can be searched, added on-demand and pinned for future use.

With 20.3:

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

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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**.
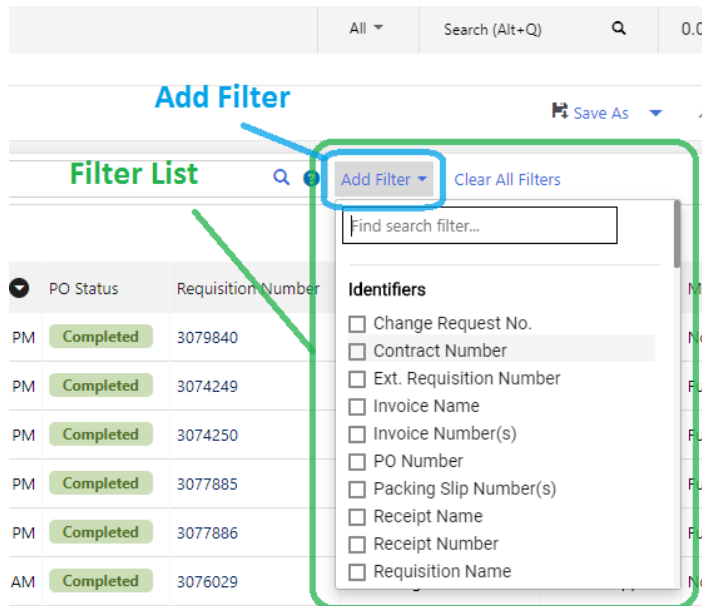
Select **Add Filter** to view Available Filters and click the box to add the specific filter
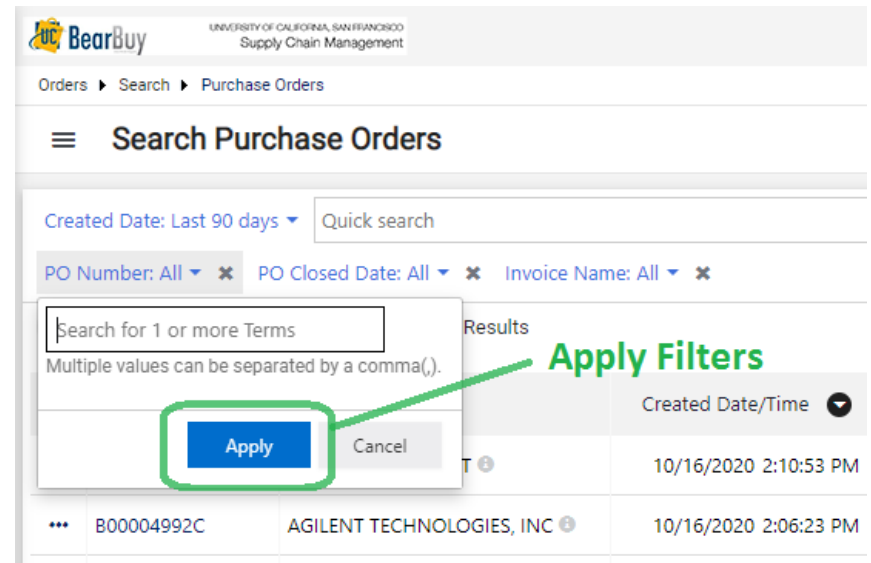
After selecting a filter, specify filter values and click **Apply**

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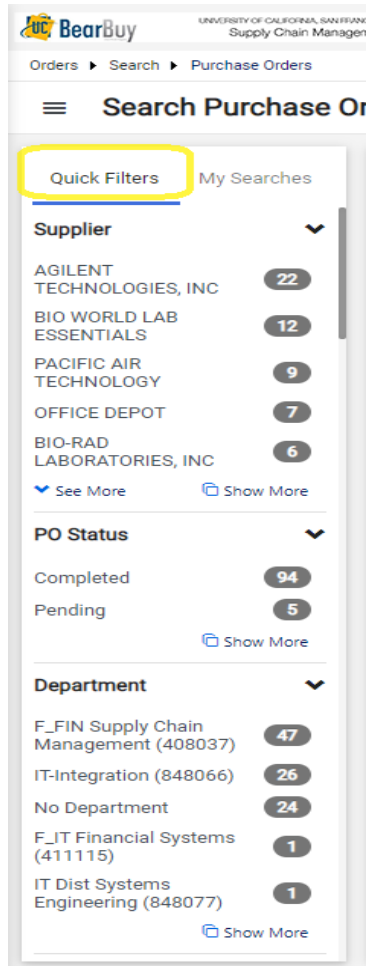
Quick Filters are commonly used filters accessible depending on the Document type (e.g. PO Status, Invoice Status, etc.).

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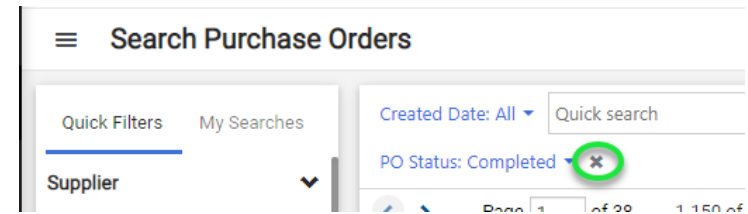
- To remove the quick filter from your search, click the x

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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.
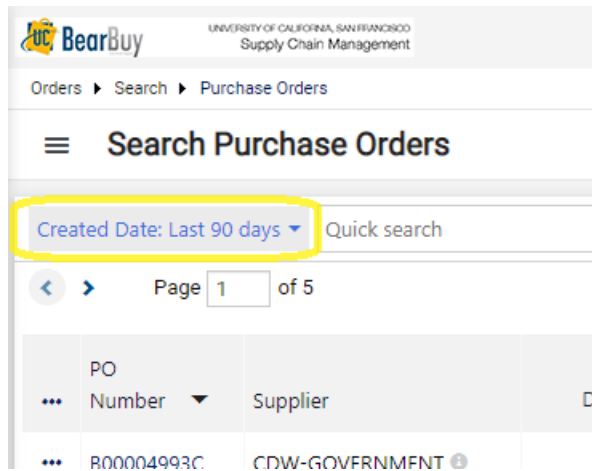
Select **Created Date** to view filter options
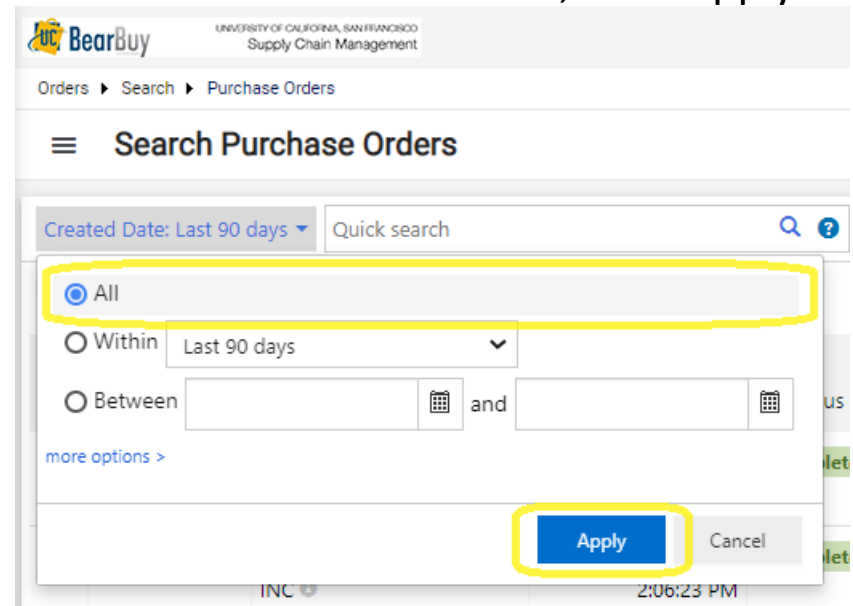
Select **All** and click **Apply**

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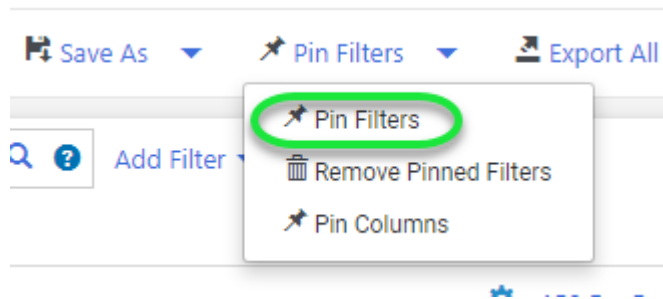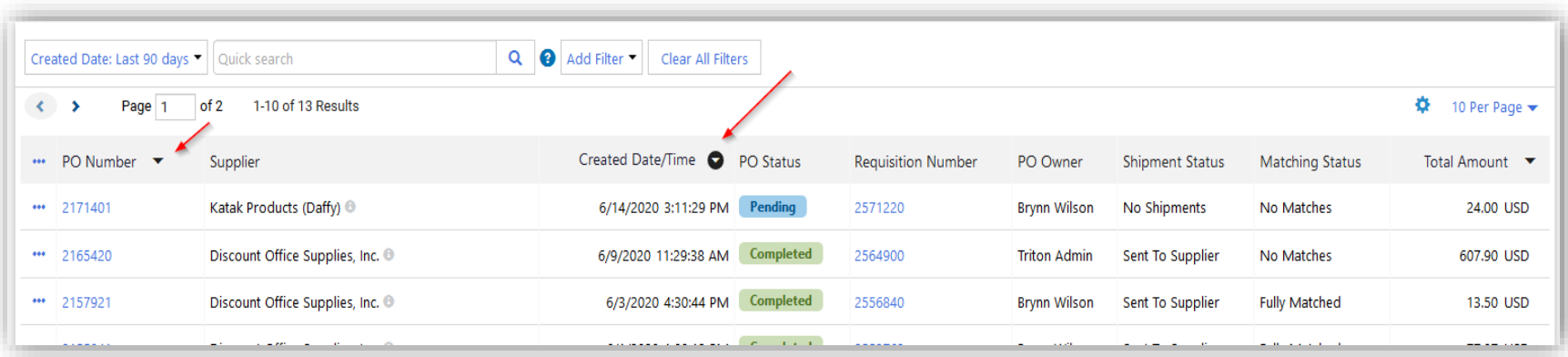
Once you select Pin Filters, you will be prompted to confirm the search filter which will then become the default layout for new searches on this page each time you return.

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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 ⊙

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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

After 20.3

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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
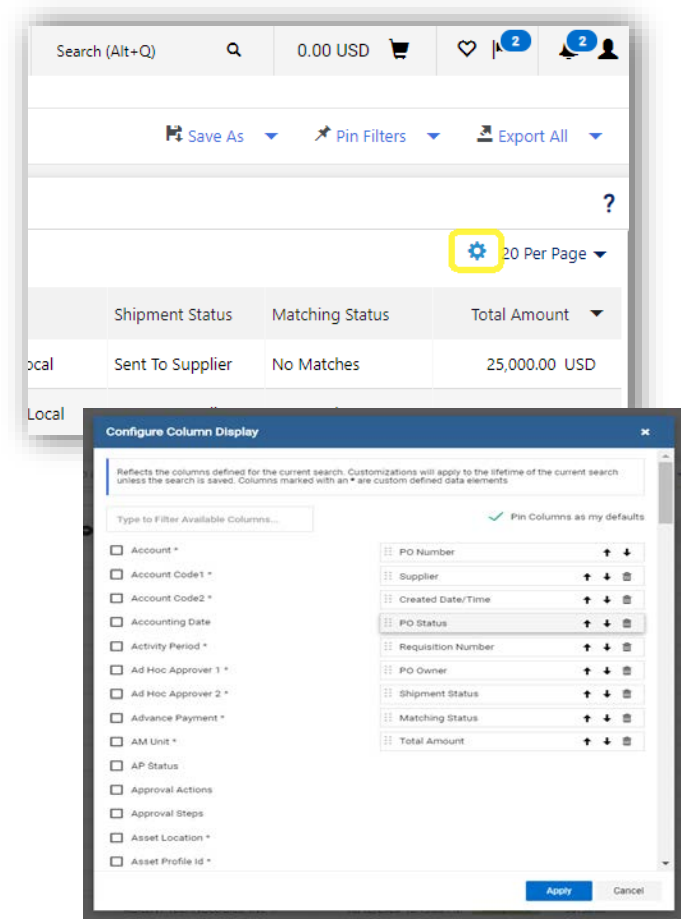
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Pin Filters & Pin Columns

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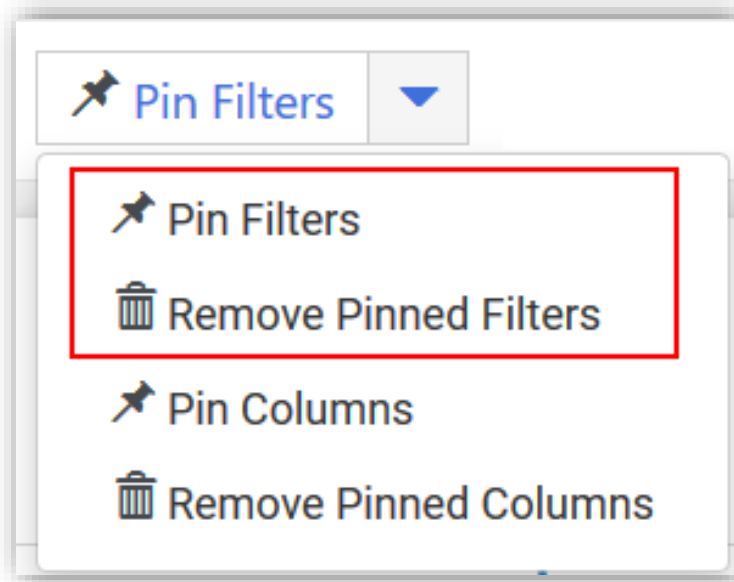
Pin Filters and Columns by selecting the option in the **Pin Filters** dropdown above search results.

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

The remove option only displays if you have pinned items.

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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:
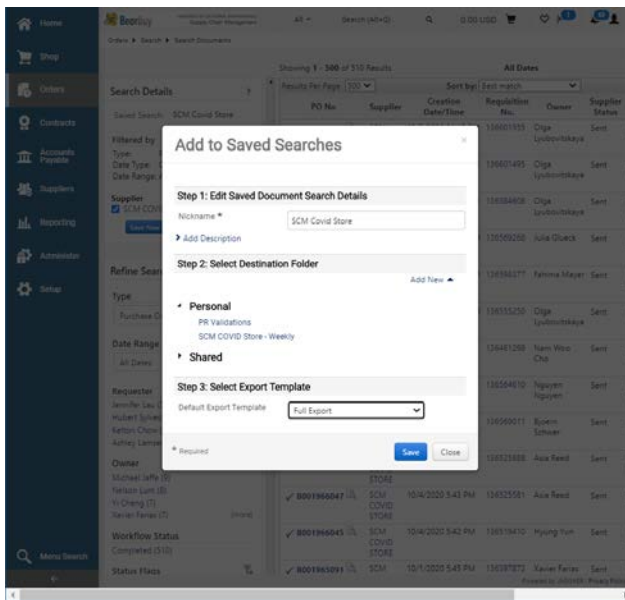
With 20.3:
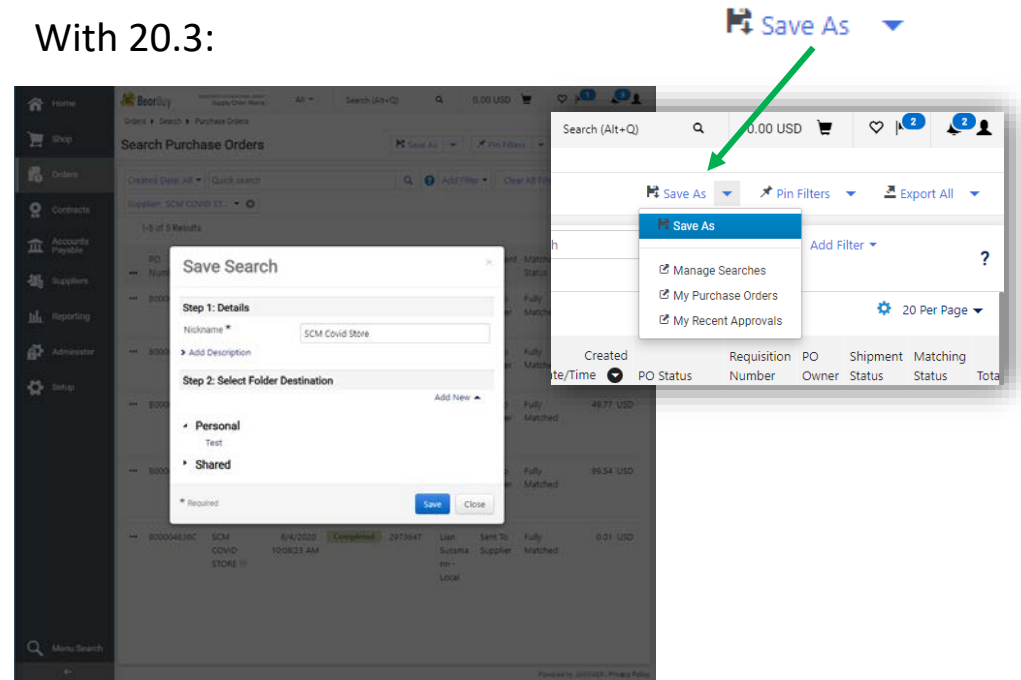
Once you have added the desired filters and search parameters to your search, click **Save As**, add a name to the Saved Search, and select the search folder to add it to.

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My Searches

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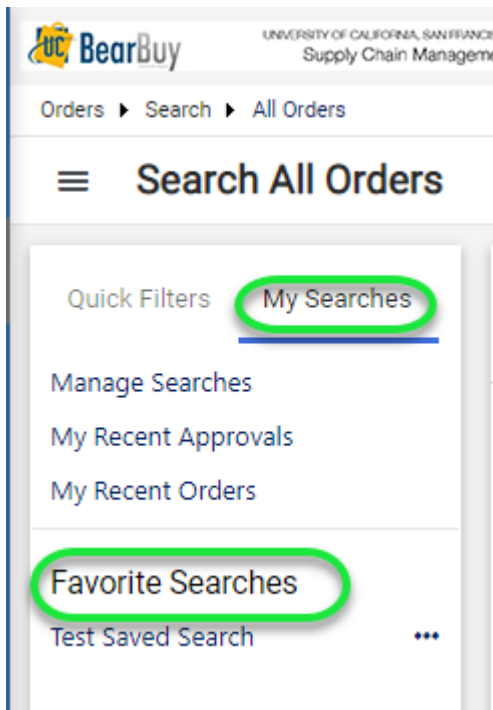
Click ☰ to access My Searches.

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.

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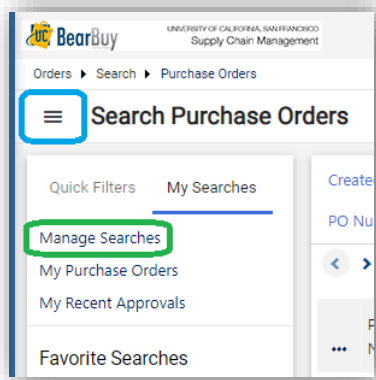
OR
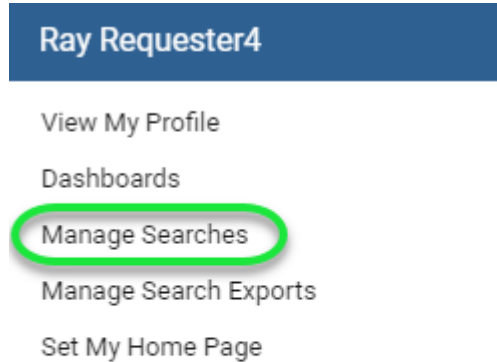
Navigate to the User Profile dropdown > **Manage Searches**.

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

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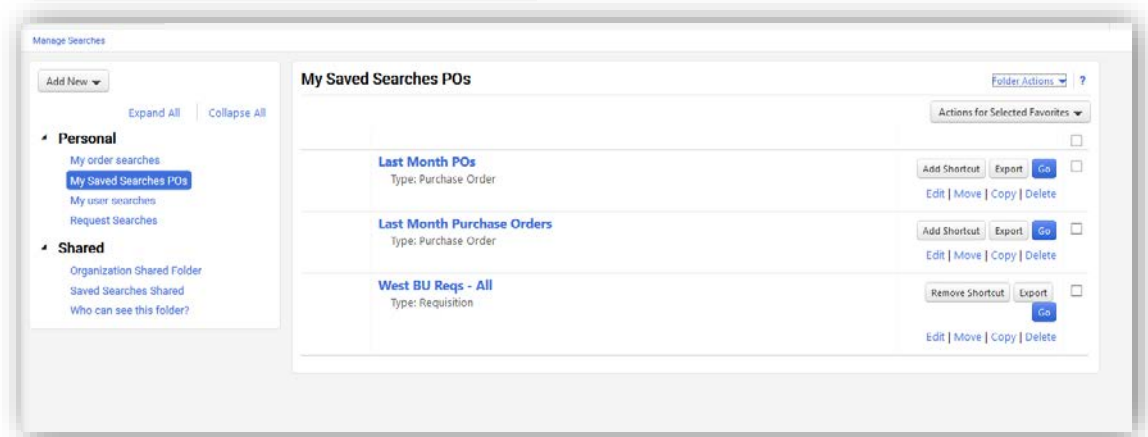
Export Search Results

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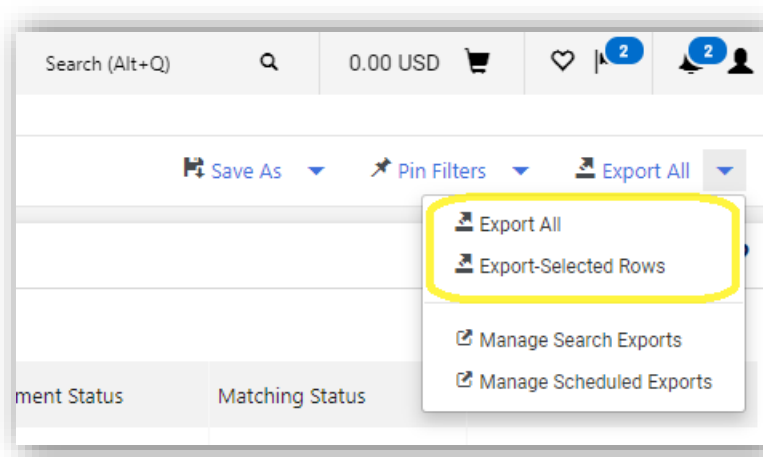
Click the drop down for **Export All** or **Export Selected Rows.**

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

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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.
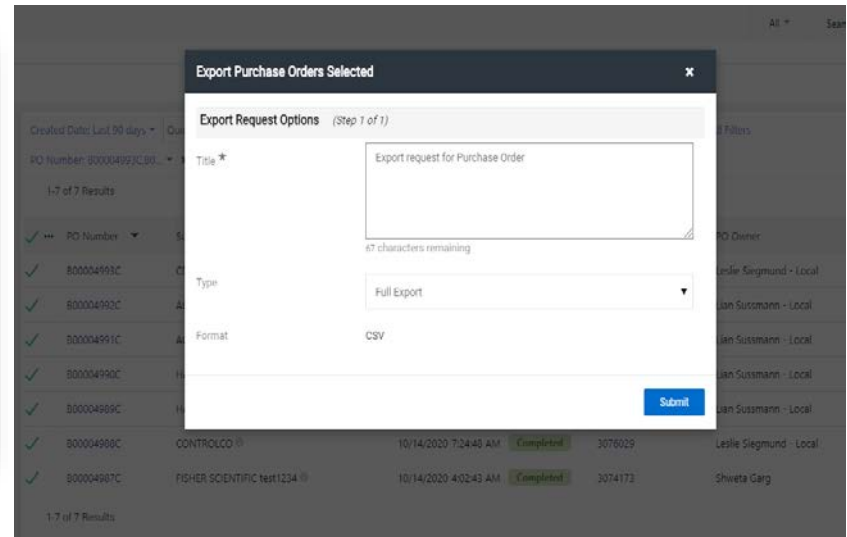
OR

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

Manage Export Requests

> Click to Filter

Refresh this Page

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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

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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

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Thank you!