

EFFECTIVE 10/1/2019 -
only Simon Schuster needs
to be added as Adhoc
Approver in Bear Buy.

Adding Adhoc Approvers in BearBuy
for Exceptional Approval

uc BearBuy

SIMON SCHUSTER | Action Items | Notifications | 300.00 USD

Shop | My Carts and Orders | Open My Active Shopping Cart | Cart - 54081200 - Draft Requisition | Logout

Shopping Cart for SIMON SCHUSTER

Continue Shopping | 1 Item(s) for a total of 300.00 USD

Name this cart: 2014-09-10 SF620009 01

Proceed to Checkout or Assign Cart

Have you made changes? Update | Help | Empty cart | Perform an action on (0 items selected)... | Select All

GRACE STREET CATERING more info...

Product Description	Unit Price	Quantity	Total
<p>Item added on Sep 10, 2014</p> <p>Meeting and Entertainment Payment Request Form open form...</p> <p>Attachment to Check Required No</p> <p>Hold Check for Pick-Up No</p> <p>Payment Message (70 char. max) this is a test - not to be processed</p> <p>Commodity Code 00307 - Facility Rental/Food-57200</p> <p>Taxable <input checked="" type="checkbox"/></p> <p>Capital Expense <input type="checkbox"/></p>	300.00 USD	1	300.00 USD

view cart history

After completing the initial pages for food selection, adding event info etc. you will be presented with your shopping cart.

Click the “Proceed to Checkout” button.

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SIMON SCHUSTER | Action Items | Notifications | 300.00 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Summary - 54081200 - Draft Requisition

Logout

Procurement Department [OK] Optional Approval [OK] General [OK] Shipping And Purchase Order [OK] Accounting Codes [OK] Internal Notes and Attachments [OK] External Notes and Attachments [OK] Billing [OK] Final Review [Warning] Assign Cart

Return to shopping cart | Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- The form "Meeting and Entertainment Payment Request Form" is incomplete or has errors. Open the form and correct the errors.

Requisition | PR Approvals | PO Line Preview | Comments | Attachments | History

Summary | Shipping And Purchase Order | Accounting Codes | Billing | Miscellaneous Information | Asset Management

Hide header | Hide value descriptions

Procurement Department		Optional Approval			
Procurement Dept Code	edit	Requisition Pre-Approver	Ad Hoc Approver 1	Ad Hoc Approver 2	edit
122119		no value	no value	no value	
M_DO-Central-OR-CP Flow-Thru					
General		Shipping And Purchase Order			
Cart Name	edit	Ship To edit			
2014-09-10 SF620009 01		Attn: SIMON SCHUSTER 3333 California St Laurel Hts 105 San Francisco, CA 94118 United States			
Requester	Prepared for	Review Before Pay	edit		
SIMON SCHUSTER	SIMON SCHUSTER	no value			
Buyer Name	Buyer Email	Buyer Phone	edit		
no value	no value	no value			
		Delivery Options edit			
		Ship Via	Requested Delivery Date		
		Best Carrier-Best Way	no value		

View/edit by line item...

Under the Summary tab, you will see the optional Approval section.

Click the "edit" button.

1. The additional Approvals box will appear. Click “[Select from all values...](#)” and

2. The Custom Field Search box will appear. Type the name of the adhoc approver and click the “Search” button.

The screenshot shows the BearBuy system interface. At the top, the user is identified as SIMON SCHUSTER. The navigation bar includes links for Shop, My Carts and Orders, and Open My Active Shopping Cart. The main content area displays a requisition form with various approval steps: Procurement Department, Optional Approval, General, Shipping And Purchase Order, Accounting Codes, Internal Notes and Attachments, External Notes and Attachments, Billing, and Final Review. A search popup window is open, showing a table with one result: Value (Code) SF620009 and Description (Name) Simon R. Schuster M_DO-Central-OP-Admin Units. The 'select' button next to this result is highlighted with a red box. In the background, the 'Additional Approvals' section of the requisition form is visible, with two approver entries: 'Ad Hoc Approver 1' (Simon R. Schuster) and 'Ad Hoc Approver 2' (Denise H. Lau), both highlighted with red boxes. The 'Requisition Pre-Approver' field is empty.

The adhoc approver's info will appear. Now click on the "select" button.

Repeat these steps for Ad Hoc Approver 2, but add Denise Lau's name. **Click Save**

Please note that the Requisition Pre-Approver field should be left blank

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Shop | My Carts and Orders | Open My Active Shopping Cart | Summary - 54081200 - Draft Requisition | Logout

Procurement Department | Optional Approval | General | Shipping And Purchase Order | Accounting Codes | Internal Notes and Attachments | External Notes and Attachments | Billing | Final Review | **Assign Cart**

Return to shopping cart | Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- The form "Meeting and Entertainment Payment Request Form" is incomplete or has errors. Open the form and correct the errors.

Requisition | PR Approvals | PO Line Preview | Comments | Attachments | History

Summary | Shipping And Purchase Order | Accounting Codes | Billing | Miscellaneous Information | Asset Management

Hide header | Hide value descriptions

Procurement Department	Optional Approval		
Procurement Dept Code	Requisition Pre-Approver	Ad Hoc Approver 1	Ad Hoc Approver 2
122119	no value	SF620009	SF652524
M_DO-Central-OR-CP Flow-Thru		Simon R. Schuster M_DO-Central-OP-Admin Units	Denise H. Lau M_DO-Central-OP-Admin Units

You will now see the adhoc approvers listed in the Summary Tab.

Once you are satisfied that all the required documents needed for exceptional approval are attached, click the “Assign Cart” button.

Please Note that the supplemental form is now NOT required.

Assign Cart button sends the report to the approver within your department.

After the final department approver, the report it will *automatically* route to the adhoc approvers AP will receive the report after Ad hoc Approver 2 approves the report. See next slide.

At each step the requester and all department control points can receive email notifications.

Exceptional Approval Process For M&E Expenses In BearBuy

