

## UC Berkeley Supply Chain Management

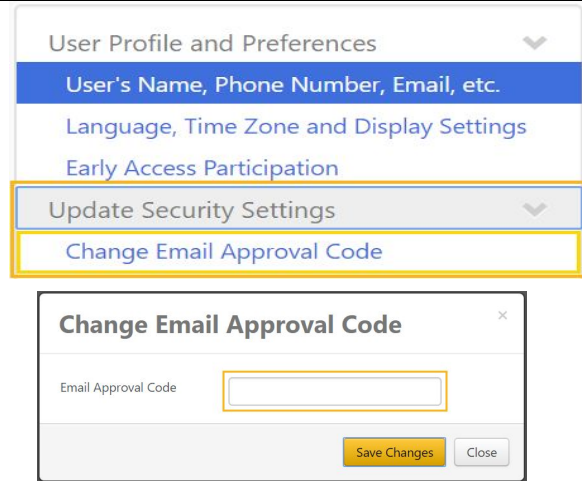
### Email Approval Quick Reference Guide

For more information and training resources, please see the [BearBuy website](#).

Email Approval in BearBuy is a new useful feature that gives selected users the capability to approve submissions without having to log in to BearBuy. Effective March 16, 2020, Requisition Approvers and Authorizers (including Chartfield 1 and Chartfield 2 approvers) will be granted email approval access. Users with these roles will need to create an **Email Approval Code (PIN)** to use this functionality.

#### Creating your PIN:

- At the top right hand side of your BearBuy homepage, click on the **user icon** located at the very end.
- Then, click on **View My Profile**.
- Select **Update Security Settings** from the menu located on the left hand side. Then, click on **Change Email Approval Code**.
- Please create a 4 digit (minimum) alpha numeric code that you will easily remember since you will be required to enter it whenever you approve via email.
- Click **Save Changes** once you have entered your PIN. **DO NOT share your pin.**



The screenshot shows the 'User Profile and Preferences' dropdown menu with 'Update Security Settings' selected. Below it, the 'Change Email Approval Code' dialog box is displayed, featuring an input field for the 'Email Approval Code' and 'Save Changes' and 'Close' buttons.

#### Email - What Approvers Will/Will Not See:

Once a requisition is sent for your approval, you will receive an email consisting of the requisition's summary and details. The email will show details of multiple COA/Chartstring used at the **header level**, but will only indicate "Accounting Code Values vary by line" for line level.

- From the email, click the **Take Action** button which will open a new page.
- Upon clicking the **Take Action** button, you will be given two (2) options: 1) **Assign to Myself** or 2) **Approve** (PIN required).
  - If you select **Assign to Myself**, more options will display in which you can:
    - Approve
    - Return to Shared Folder
    - Return to Submitter
    - Forward
    - Reject/Cancel

#### Best Practices:

- If the Requisition indicates COA values vary at the line level, it is highly recommended for you to login directly to BearBuy for reviewing and approving the transaction.
- Please be advised that any **edits to the Requisition cannot be made via the approval email**. To make edits, please log in to BearBuy directly.
- **DO NOT forward this email**. No one will be able to approve or act on the email without your individual PIN code.

#### Support

- **First Line of Support:** BearBuy Help Desk
  - Available Mon. – Fri. from 8AM to 5PM, **Phone:** 510-664-9000 Option 1, Option 2
  - **Email:** [bearbuyhelp@berkeley.edu](mailto:bearbuyhelp@berkeley.edu)
- **Regional Group Purchasing Inquiries:** <https://portal.berkeley.edu/regions>
- **Invoice Inquiries:** <https://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors>
- **Inquiries for High Value Goods and Services over \$10,000:** <https://supplychain.berkeley.edu/procurement/contact-your-buyer>