

ESPM

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A Tutorial Guide for Non-Travel and Non-Entertainment Reimbursements in BearBuy


PREPARED BY THE DEPARTMENT OF
ENVIRONMENTAL SCIENCE, POLICY, & MANAGEMENT

Non Travel and Entertainment Reimbursement

- Sign into BearBuy and select the “Payment Request Form”

The screenshot displays the BearBuy interface with several sections of vendor logos and form options. The top section contains logos for EMD Chemicals, Fisher Scientific, life technologies AB | invitrogen, EMD Millipore, Neta Scientific, and NEW ENGLAND BioLabs. The second section contains logos for PRAXAIR, Promega, RAININ Pipetting 360°, Santa Cruz BioTechnology, GEMA-ALDRICH Catalog and Oligo Punch-out, and spectrum. The third section contains logos for STANLEY STOCKROOM VWR and VWR INTERNATIONAL. Below these are three sections: 'Electronics' with Agilent Technologies, Digi-Key, and GrayhaR; 'Computer Software/Hardware' with Apple, CDWG, DELL, main street technologies, and shi; and 'Frequently Used Forms' with Non-Catalog Form, Payment Request Form (circled in red), Amount Only, Service Order Request, Subaward - Non UC Recipient, and Subaward - UC Recipient.

Enter in your name, employee id/student id and your contact information

Instructions ?	Supplier / Payee Info ?												
 <p>Items in Bold are required to be completed in order to completely process a Payment Request.</p> <p>Shoppers and Cart Authorizers may submit incomplete forms for processing provided a supplier name (or Supplier Not Found) is selected.</p> <p>A Requisition Creator must complete all required fields before a request can be finalized.</p> <p>Payment Request Activities have different documentation requirements which must be attached to the Payment Request Form.</p> <p>Detailed information about the requirements is on the Disbursements Website.</p>	<p>Payee Information</p> <p>Supplier Supplier Not Found more info... select different supplier</p> <p>Fulfillment Address Fulfillment Address 1: (preferred)</p> <p>Distribution If a PO is dispatched to the Vendor, BearBuy will dispatch the PO using the method(s) listed below:</p> <ul style="list-style-type: none"> • If the desired Supplier / Payee is unknown or is not found above, please select 'Supplier Not Found', and then provide suggested supplier information in the fields below. • If the payment is to a Current UCB Employee or Student, include the Employee ID or Student ID in the UCB Employee or Student ID field below. • Shoppers and Cart Authorizers do not have access to student names. • Please enter "Supplier Not found" if this is for a student payment. <p>Payee Not Found: Name <input type="text" value="First Name Last Name"/></p> <p>UCB Employee or Student ID <input type="text" value="123456789"/></p> <p>Suggested Contact Email/Phone <input type="text" value="email@berkeley.edu"/></p> <p>Payment Request Items ?</p> <p>Line Items: Enter one or more lines.</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Unit Price</th> <th>Quantity</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> <p>254 characters remaining expand clear</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Unit Price</th> <th>Quantity</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>	Item	Unit Price	Quantity	<input type="text"/>	<input type="text"/>	<input type="text"/>	Item	Unit Price	Quantity	<input type="text"/>	<input type="text"/>	<input type="text"/>
Item	Unit Price	Quantity											
<input type="text"/>	<input type="text"/>	<input type="text"/>											
Item	Unit Price	Quantity											
<input type="text"/>	<input type="text"/>	<input type="text"/>											

- Enter in the items for reimbursement, the unit price, and quantity

Line Items: Enter one or more lines.

Item	Unit Price	Quantity
<input type="text" value="Item A purchased for Annual ESPM event"/> <small>216 characters remaining</small> expand clear	<input type="text" value="20"/>	<input type="text" value="1"/>
<input type="text"/> <small>254 characters remaining</small> expand clear	<input type="text"/>	<input type="text"/>

- For activity type, select “Reimbursement (Non T&E)”

Activity Type ▼

Internal Payment Note

250 characters remaining [expand](#) | [clear](#)

Required Documentation: Attach supporting documents appropriate to the Payment Request Activity Type - for details access the [Disbursements website](#).

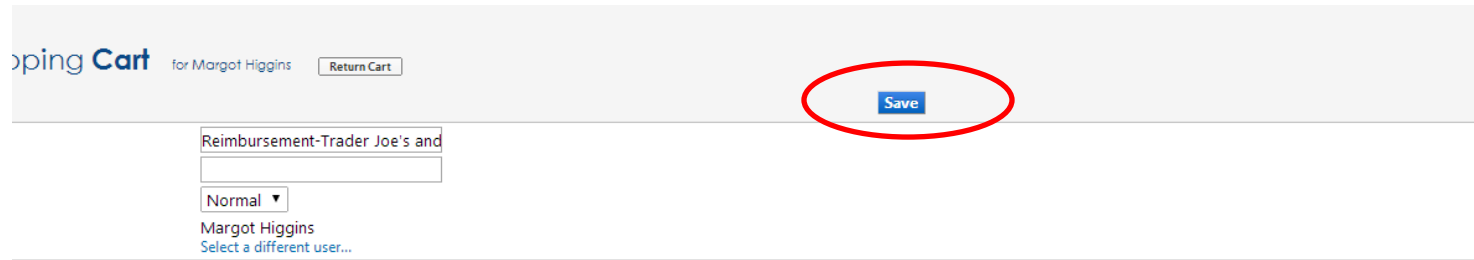
- Upload guest list, flyer event, and receipts. **Please note that it must be uploaded as a PDF.**

The screenshot shows a web form with several sections. At the top, there is a yellow highlighted area with the text 'uploading it. [Data Privacy]'. Below this is a section titled 'Internal Attachments [Privacy Warning]' which contains a blue link 'add attachment...'. This section is circled in red. Below the attachments section is a grey header for 'Payment and Handling Details' with a question mark icon. Underneath, there is another yellow highlighted area containing two bullet points: 'Users may use this section to designate various handling instructions and requirements.' and 'Only Requisition Creators are required to complete this section.' Below this are two input fields: 'Invoice Number' and 'Invoice Date' (with a calendar icon and the format 'mm/dd/yyyy').

- Scroll up to the top of the form and save the cart by selecting “Add and go to cart” and press “Go”.

The screenshot shows a web form with a grey header for 'Supplier / Payee Info' with a question mark icon. Above this header, there is a dropdown menu labeled 'Available Actions:' with 'Add and go to Cart' selected. To the right of the dropdown are 'Go' and 'Close' buttons, and a printer icon. Below the header, the text reads 'Supplier Not Found' with a blue link 'more info...' and another blue link 'select different supplier'. Below that is the text 'Fulfillment Address 1: (preferred)'. At the bottom, there is a yellow highlighted area with the text 'or, BearBuy will dispatch the PO using the method(s) listed below:'.

- Change the cart name and enter in a new Cart Name that will be recognizable to the approver. Once entered, press “save”



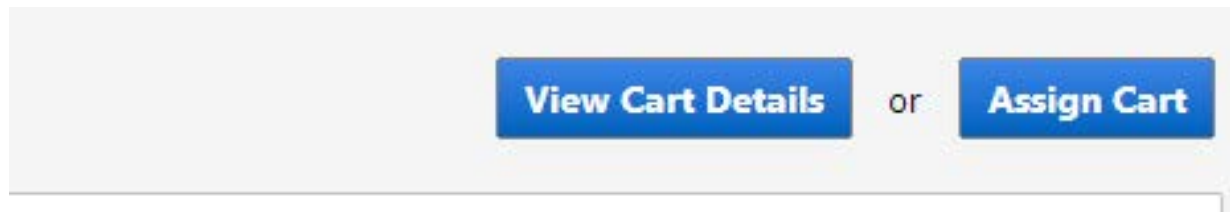
Opening Cart for Margot Higgins [Return Cart](#)

Normal ▾

Margot Higgins
[Select a different user...](#)

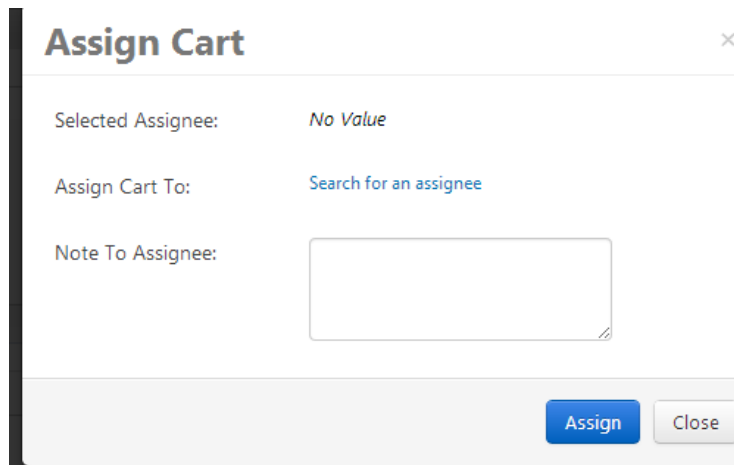
Save

- In the top right-hand corner, select “assign cart” and assign the cart to your PI



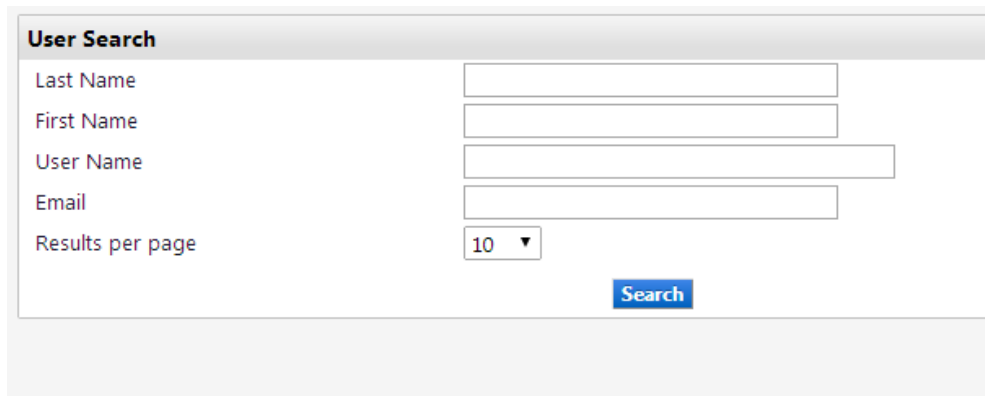
View Cart Details or **Assign Cart**

- To choose the name of your PI, select “Search for an assignee”



The image shows a dialog box titled "Assign Cart" with a close button (X) in the top right corner. It contains three fields: "Selected Assignee:" with the value "No Value", "Assign Cart To:" with a blue link "Search for an assignee", and "Note To Assignee:" with an empty text area. At the bottom right, there are two buttons: "Assign" (blue) and "Close" (grey).

- Enter in their last name and first name and then press “search”



The image shows a "User Search" form with a grey header. It contains five input fields: "Last Name", "First Name", "User Name", "Email", and "Results per page" (a dropdown menu set to "10"). A blue "Search" button is located at the bottom right of the form.

- Click on the name of the approver and the cart will be assigned for their approval.