University of California
Berkeley

UC BearBuy

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Bears That Buy Town Hall
January 27, 2015

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Agenda

- BearBuy System Enhancement Requests
- Forms Consolidation - project update!
- Cal Answers Procure-to-Pay reports
- BearBuy Resources and Support
- Questions and Answers
- Raffle!!

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Reminder of Department Name Change

To better align with our activities on the UCSF and UC Berkeley campuses, Campus Procurement and Contracting (UCSF), Procurement Services (UC Berkeley), and Distribution, Storage and Mail (UCSF) announce that effective May 15, 2014, the new unified department name will be Supply Chain Management (or SCM in acronym).

This change has allowed us to more closely align our department identity with the services provided to the UC Berkeley and UCSF campuses.

What this means for BearBuy?
- No BearBuy functionality or ownership has changed. The only thing that has changed is the name of the department that supports the eProcurement system.

We are Supply Chain Management, Operations & Technology

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BEARBUY SYSTEM ENHANCEMENT REQUESTS

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Enhancement Request Process

Suggestions for how BearBuy could be improved are submitted through a BearBuy Help Desk ticket. All requests include a business justification explaining how the enhancement would benefit the individual or the department.

- Enhancement tickets are reviewed on a quarterly basis and tracked
  - User education vs true enhancement
  - Workarounds suggested

- A true SciQuest enhancement must benefit the campus or majority of users

- UCB and UCSF combine enhancement requests and submit them to SciQuest for review

- SciQuest evaluates enhancement requests submitted from all clients and determines which ones are most beneficial and feasible and includes them in the system release

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Enhancement Requests Enabled

Release	Feature	Feature Description
14.1	Assign Cart interface upgrade	The look and feel of the assign box changed to facilitate easier assigning capabilities.
14.1	Supplier Profile Interface upgrade	Increased Supplier search and profile viewing capabilities. Functionality limited to: Requisition Creator, Change Order Preparer, Buyer, AP Voucher Entry and AP Withholding reviewer.
14.1	Full PR Export update	*Prepared for* name now included in document search exports. This allows departments to see the shoppers name associated to the requisition in the export reports.
14.2	Collapsible Catalog Categories	Can expand and collapse home/shop Catalog Categories. Allows user to customize their home/shop page a little more.
14.2	BearBuy User Profile Interface update	Profile layout change creates easier navigation through ones profile. How email notifications are enabled/disabled also improved.
14.2	'Successfully Saved' notification	'Successfully saved changes' message displays when changes are saved in BearBuy. Provides a more obvious indication that changes are saved.
14.3	Upload multiple attachments	Now BearBuy can facilitate uploading multiple documents at once. Makes file uploads faster and more efficient.
14.3	Easily move attachments	Easily move a file in an attachment section from internal to external (or vice versa) after upload.
14.3	Rename Bookmarks	Users can rename bookmarks to a more meaningful name.
14.3	Document Search added date range option	New Document Search date option allows searching for documents within a specified range of days.
14.3	Help text look and feel	Topics are organized in a tree format, clicking on text in tree displays help text for topic. We will be working on updating the help text content.
14.3	Approver visibility to POs & Vouchers	Authorizers and Requisition Approvers now are able to view the requisitions they approve and all the associated transactions to that req (Pos and vouchers, receipts).

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FORMS CONSOLIDATION – PROJECT UPDATE

Forms Consolidation Project

- Background
  - Use of form types does not necessarily require justification or indicate failure to comply with policy.
  - There is a risk that transactions may not be routed and special approvals may not be obtained for those transactions not submitted on forms requiring special approvals.

- Scope
  - By September 30, 2014, have already identified which forms in BearBuy can be consolidated based on workflow, usage and associated UCB/UCOP policy. The identification of which forms can be consolidated will be made by the project core team members with input from various client focus groups.

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Changes to Scope

- After evaluating resources, it was determined that a SmartForm being developed by SciQuest can potentially reduce forms in BearBuy and/or replace how we use forms.

- New Project Scope:
  - Create additional *BearBuy Forms* training opportunities offered to UC Berkeley Staff as requested by UC Berkeley Audit in order to shorten the training gap that currently exists on campus by March 31, 2015. This project is a short-term solution (Phase I) which will be followed by a permanent long-term solution (Phase II) mid-2015.

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Project Next Steps

We're looking for department Shoppers interested in participating in forms focus group.
- Formal invitation to participate will be sent once focus group participant list is finalized
- Time commitment ~ 1 to 2 days (active work)
- Interested? Contact Carla Prado (cprado@berkeley.edu)

Milestone	Date	Status
Forms tip included in Dec 2014 newsletter	Monday, December 15, 2014	Completed
Forms tip included in Jan 2015 newsletter	Thursday, January 15, 2015	Completed
Forms tip included in Feb 2015 newsletter	Friday, February 13, 2015	In process
Host 20/30 Webinar: BearBuy Forms	Wednesday, February 4, 2015	In process
Host 20/30 Webinar: Additional Forms training. Specific topic TBD by project sponsor.	Wednesday, March 18, 2015	Pending
Hold first forms focus group	Mid July (pending time-line approval)	Pending
Hold second forms focus group	Mid July (pending time-line approval)	Pending

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CAL ANSWERS PROCURE-TO-PAY REPORTS

Cal Answers Demo

- Cal Answers is available for BearBuy reporting needs
  - http://calanswers.berkeley.edu/

- What is Cal Answers used for?
  - Monitor goals
  - Improve processes & regulatory controls
  - Discover opportunities to save money

- Resources for Cal Answers Procure to Pay reports are available on their website
  - Videos and slides available for various reports and dashboard navigation

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Cal Answers Demo:

- Cal Answers > Procure to Pay > Operations > Purchase Order Summary
  - Analyze Purchase Orders for your department
  - View PO Balances
  - Navigate to Requisitions, Receipts and Vouchers

- Search Criteria include date range, Supplier and Chartstring values

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RESOURCES AND SUPPORT

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Online Resources

- The BearBuy website is the source for the most up to date news, announcements and training resources
  - procurement.berkeley.edu/bearbuy.

- BearBuy YouTube Channel - Short demos videos!
  - youtube.com/user/BearBuyProcurement.
  - Subscribe to receive notifications when new videos are posted.

- Follow us on Instagram!
  - Another source of receiving news about upcoming events
  - http://instagram.com/ucb_bearbuy?ref=badge

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Help Desk

- BearBuy Help Desk #1 place to stop for help:
  - BearBuy information (about BearBuy),
  - Recommended best practices,
  - Technical assistance,
  - Policy related questions, and
  - Much more!

- Contact the BearBuy help desk!
  - (510) 664-9000 Option 1, Option 2, Option 1
  - Mon-Fri 8 AM to 5PM
  - Email BearBuy Help (bearbuyhelp@berkeley.edu)

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Questions and Answers!

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