BearBuy Shopper Training
1. Introduction
2. Concepts & Process Overview
3. Shopping
   - Catalogs
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CONCEPTS & PROCESS OVERVIEW
BearBuy Terminology - Roles

• Shopper
  – UC Berkeley staff, faculty, active graduate student, and all other student employees are Shoppers.
  – Must have logged into BearBuy once to obtain access.

• Requisition Creator
  – Reviews Requisitions for accuracy and policy compliance.
  – Can edit Requisition fields (Org Node, Ship To Address, Final Destination, Additional Authorizers 1/2, Chart Of Account (COA) fields, form information, etc).
  – Knows the department’s Procurement processes.
  – Cannot be the Requisition Creator and Requisition Approver for the same transaction.

• Requisition Approver
  – Reviews Requisition for appropriateness, accuracy, and chartstring assignment.
BearBuy Terminology - Function

• Assign
  – Refers to the action when a shopping cart is routed to another Shopper for authorization prior to the creation of the requisition,
  – Second shopper is referred to as the ‘Cart Authorizer’.

• Submit
  – Refers to the BearBuy action required (clicking the SUBMIT button) and converts BearBuy order from a shopping cart to a requisition.
  – In order to "Submit" an order, an Org Node must be associated to the order.
BearBuy Terminology – Types of Documents

Every cart submitted in BearBuy will always have an associated Requisition, Purchase Order and Voucher(s)

• Requisition
  • Request to purchase goods and services are added to carts in BearBuy.
  • Once the cart has been submitted, the cart is called a Requisition (request to purchase).
  • The BearBuy system converts a Requisition into a Purchase Order once it completes approval workflow.

• Purchase Order
  • Legally binding document sent electronically, via fax or email to an external Supplier. A PO is an agreement between UC Berkeley and the Supplier to acquire and provide specified goods or services.

• Voucher
  • Electronic version of a Supplier invoice created in BearBuy

• Receipt
  • Electronic receipts where shipping information is recorded acknowledging receipts of good or services
Data Privacy

Do not add personal identifying information on BearBuy carts, including on ATTACHMENTS.

• What is considered personally identified information (PII)? Anything that contains an individual’s name or initials combined with a:
  • social security number,
  • credit card number,
  • driver's license or state identification card number,
  • any type of medical or medical insurance information, or
  • any personal financial account number.
  • Full birthdates MM/DD/YY

• Similarly, an individual’s home address and family information also requires restricted access control.
BearBuy General Workflow Overview

Cart
- Shopping
  - Hosted Catalog
  - Punchout Catalog
  - Forms
- Requisition Creator
  - Verifies characterization, shipping, other essential information.

Purchase Requisition
- Authorization
  - Optional additional authorizations
- Approval(s)
- Purchasing
  - Review high dollar end items requiring buyer intervention

Purchase Order
- Supplier
  - Receives PO
  - Fulfills goods/services

Fulfillment
- Receiving (for Goods)
  - Unpacking
  - Quality Checking
  - Desktop Delivery
- Receiving (for Services)
  - Confirm that services were rendered

Payment Status
- Payment
  - Payments from BFS
  - Payment information lookup available in BearBuy

Voucher Entry & Approval
- Invoice
  - PO invoices entered by Disbursements
- 2-way Match
  - Voucher + PO match
  - Based on tolerances
  - Routing for match exceptions
- Approval
  - Dept approval for voucher
  - Threshold TBD

CSS
About Your Campus Buyer

Campus Buyers have the professional expertise, skills and knowledge to handle complex and high value transactions. These individuals have been delegated the authority to process transactions above low value delegated limits.

**Campus Buyers provide services to:**
- Assist departments with planning procurement activities
- Select appropriate sources, including identification and management of suppliers
- Negotiate and review terms and conditions with suppliers
- Analyze business issues, activities and transactions
- Solicit competitive bids through requests for information, quotations, or proposals
- Assist departments with UC business policy interpretation and compliance
- Assist departments with the creation of a Statement of Work (SOW) when appropriate, for supplier services
- Sign contracts and agreements for goods and services (departments do not have the delegation to sign these)

The Campus Buyer is included in BearBuy workflow, either when the purchasing dollar amount or purchase type requires Buyer involvement or when the department indicates that Buyer intervention is needed.

Each campus department has a Campus Buyer assigned to support their procurement needs. See the [Campus Buyer Assignments](#) on the SCM Campus Buyer website* to determine which Buyer supports your department.
Practices & Procedures

• All orders are placed through BearBuy
• A “Business Purpose” statement is required for all orders
  • What is being purchased?
  • Why it’s being purchased?
  • How does the University benefit from this transaction?
• For all orders are placed through BearBuy select or enter a comment containing:
  • Proper ship to address,
  • Appropriate chart string,
  • Attach appropriate supporting documents to orders
• BearBuy carts can either be submitted or assigned.
  • Minimum submitting requirement is a valid Org Node.
BearBuy Shopper Training

SHOPPING CATALOGS
UCB Frequently Used Catalogs

- Office Supplies
  - Give Something Back
  - Grainger
  - HD Supply Facilities Maintenance
  - Office Depot

- Furniture
  - Steelcase/One Workplace

- IT
  - Apple,
  - SHI International
  - Dell
  - Graybar Electric
  - CDW G,
Shopping Catalogs in BearBuy

• Catalogs are featured on the Home/Shop page

• 2 types of catalogs in BearBuy
  • Hosted: Items can be retrieved by searching within the catalog OR conducting a product search from the top search bar
  • Punchout: Items can be retrieved by searching within the punch-out catalog

• No additional documentation is needed when shopping from catalog Supplier (low value purchases).

• Items <$1,000 will route to a Requisition Creator and then PO dispatches to the Supplier

• Items >$1,000 will route to a Requisition Creator then a Requisition Approver. After both workflow steps are complete, the PO dispatches to the Supplier

• Items >$100,000 will require an additional buyer review
Additional Features w/Catalog Shopping

• Ability to view product details

• Side by side price comparison

• Ability to save items as favorites

• Users have the ability to copy carts.
  • Be aware that some Suppliers may not support this feature.
  • If copying a cart, it’s recommended one reviews each sub-tab before submitting form.
BearBuy Shopper Training

SHOPPING FORMS
About Forms

- Used for every purchase *NOT* found in the catalog
- All forms require certain documentation – be aware of these
- There are forms specific to transaction type
  - Non-Catalog Form
  - Independent Contractor and Consultant Services
  - Service Order Request
  - Amount Only Form
  - Payment Request Form
  - After The Fact Form
- Each form has a “when to use” description on it
<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Form Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>After the Fact Purchase</td>
<td>After the Fact Form</td>
</tr>
<tr>
<td>Ammunition and Firearms</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Catering, No contract required, Payment only</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Catering, Order and Contract required</td>
<td>Service Order Request</td>
</tr>
<tr>
<td>Cell Phones, Purchase</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Computer Software, Enterprise and Security</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Computer Software, Hosting and Cloud Services</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Conference and Event Rentals</td>
<td>Off Campus Events &amp; Facility Rental</td>
</tr>
<tr>
<td>Conference Registration Fees*</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Copier Leases</td>
<td>Amount Only Form</td>
</tr>
<tr>
<td>Donations &amp; Contributions</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Entertainment, Food</td>
<td>Service Order Request</td>
</tr>
<tr>
<td>Entertainment, Other Goods</td>
<td>Service Order Request</td>
</tr>
<tr>
<td>Entertainment, Services</td>
<td>Service Order Request</td>
</tr>
<tr>
<td>Equipment, Laboratory (non-contracted)</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Equipment, Maintenance</td>
<td>Service Order Request</td>
</tr>
<tr>
<td>Equipment, Other</td>
<td>Service Order Request</td>
</tr>
<tr>
<td>Equipment, Sole Source Over $100,000</td>
<td>Sole Source Over $100,000 Form</td>
</tr>
<tr>
<td>Explosives</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Express Delivery Services</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Freight</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Furniture, Office (non-contracted)</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Gases, Toxic</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Gifts, Goods</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Government Fees</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Graphic Designer</td>
<td>Independent Contractor and Consultant Services</td>
</tr>
<tr>
<td>Honoraria (non UCB Employee or Student)</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Human Subject Fees, No Cash Funds</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Journals/Subscriptions*</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>*bluCard preferred</td>
<td></td>
</tr>
<tr>
<td>Leases, Operating</td>
<td>Amount Only Form</td>
</tr>
<tr>
<td>Loan Repayment Assistance</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Maintenance and Repair Services (non-facilities)</td>
<td>Service Order Request</td>
</tr>
<tr>
<td>Memberships*</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>*bluCard preferred</td>
<td></td>
</tr>
<tr>
<td>Miscellaneous Goods</td>
<td>Non-Catalog Form</td>
</tr>
<tr>
<td>Moving Services for new campus hires**</td>
<td>Moving Services: Household and Personal Effects</td>
</tr>
<tr>
<td>** Limited to strategically sourced Suppliers ONLY. See form for available Suppliers.</td>
<td></td>
</tr>
<tr>
<td>Multi-Location Appointment (outside Payroll)</td>
<td>Service Order Request</td>
</tr>
<tr>
<td>New Employee Moving Expense Reimbursement</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Off-Campus Facility Rental for Entertainment &amp; Travel</td>
<td>Off Campus Events &amp; Facility Rental</td>
</tr>
<tr>
<td>Participant Support Stipend</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Pay for goods/services for which a purchase order has not previously been completed.</td>
<td>After the Fact Form</td>
</tr>
<tr>
<td>Payment Request</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Personal/professional/independent contractor or consulting services</td>
<td>Independent Contractor and Consultant Services</td>
</tr>
<tr>
<td>Petty Cash</td>
<td>Payment Request Form</td>
</tr>
<tr>
<td>Printing Services, Design and Layout Services only</td>
<td>Independent Contractor and Consultant Services</td>
</tr>
<tr>
<td>Printing Services, Printing (taxable)</td>
<td>Amount Only Form</td>
</tr>
<tr>
<td>Printing Services, Printing and Mailing Services (non-taxable)</td>
<td>Service Order Request</td>
</tr>
<tr>
<td>Professional Services (business, engineering, medical, etc.)</td>
<td>Independent Contractor and Consultant Services</td>
</tr>
</tbody>
</table>
BearBuy Shopper Training

RESOURCES & SUPPORT
Resources

• The BearBuy website is the source for the most up to date news, announcements and training resources
  – supplychain.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
Help Desk

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

• Contact the BearBuy help desk!
  • (510) 664-9000 Option 1, Option 2
  • Mon-Fri 8 AM to 5PM
  • Email BearBuy Help (bearbuyhelp@berkeley.edu)
Questions and Answers!
APPENDIX A – BEARBURY PROFILE DEMO
Navigating Your BearBuy Profile

**Step 1:** Expand your profile by selecting your name from the top right banner.

**Step 2:** Explore your BearBuy profile

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**Default User Settings:** Can view and set custom cart fields, default addresses, and cart assignees within this section. See Slide 25 and Slide 26 for detailed view.

**Notification Preferences:** Can view and set email/system notifications for requisition (carts), POs and vouchers. See Slide 27 for detailed view.

Section contains user and location information. If updates needed, must perform changes in CalNet Directory listing.
Default Addresses

Associate ship to addresses to your BearBuy profile and/or set a default ship to address that will auto populate on all your BearBuy carts.

1. Select Default Addresses menu option

2. Click, Select Addresses for Profile

3. Search for address.
   - Use street address for off campus
   - Use building name for on-campus

4. Click Search button

5. Select radio button next to desired address

6a. Select default to make address auto-populate on all new carts

6b. Click Search button

Address information will be displayed
Setting Default Org Node & COA

Associate Org Nodes and Chartstring fields to your BearBuy profile. You can also set these fields to default to all orders. Once set to default, field value will auto populate on all your BearBuy carts.

1. Select Custom Field & Accounting Code Defaults
2. Select the Codes tab: The codes tab gives users the ability to set one, many or all custom fields to ones profile.
3. Locate and navigate to the custom field you wish to modify and select Edit.
4. Select Create New Value.
5. Enter Org Node and click Search.
6. Select checkbox next to desired Value and click Add Values.
7. To set as default Select Org Node value.
8. Select Default check box and click save.

BearBuy Profile Demo
Setting Cart Assignees (Authorizers)

Instead of searching for a cart authorizer every time when assigning a cart, you can associate a set list of cart authorizers to pick from through your BearBuy profile.

1. Select Cart Assignees

2. Select the Add Assignee button:
   Selecting this button enable a cart assignee search and will open a separate window.

3. Enter the first/last name of the individual you wish to designate as cart authorizer (assignee) to your carts, then select Search.

4. If more than 1 individual meets your search criteria, you’ll be asked to select the correct individual from a list. Click the [select] link within the actions column.

ONCE SELECTED, THE CART AUTHORIZER (ASSIGNEE) WILL BE ASSOCIATED TO YOUR PROFILE.

To set assignee as a default(auto populate on cart), select Set as Preferred.
Notification Preferences

All shoppers are setup to receive standard requisitions and voucher email notifications. You can view, turn off and turn on notifications within your BearBuy profile – notification preferences section.

1. Select Edit Section link
2. Select the Override radio button next to the notification you want to alter.
3. Expand the drop down menu next to said notification and select from:
   - None: Do not receive
   - Email: Receive notification via email
   - Notification: Receive/View notification in BearBuy only
   - Email & Notification: Receive notification via email AND in BearBuy
4. Click, Save Changes

Purchase Order Notifications: List out all notifications associated to POs. Includes, but not limited to:
- PO workflow completed,
- PO sent to supplier,
- PO rejected,
- PO line item Cancellation notice, etc.

Accounts Payable Notifications: List all notifications associated to vouchers (invoices). Includes, but not limited to:
- Invoice submitted into workflow
- Invoice workflow completed
- Voucher rejected, etc.
BearBuy Shopper Training

APPENDIX B – CART MANAGEMENT DEMO
Access Cart Management Pages & Create New Carts

All users will be able to view active cart, draft carts and assigned carts (to you and to others) through My Carts and Orders. You can create new carts, (un/re)assign carts, and delete carts from these pages.

1. Select the Shop menu icon

2. Select My Carts and Orders

3. Select View Carts

Create 1 or more new carts by selecting the blue Create Cart button visible within the Cart Management pages.

BearBuy will automatically redirect you to the newly created empty cart.
Cart Management – Draft Carts

From the Draft carts tab, you’ll be able to see all your draft carts, delete carts and activate carts. When new items are added to your shopping cart, they are added to the active cart. “Activate” in these pages simply mean identifying and marking that cart as your active cart.

A. **Draft Carts**: Contains unassigned Active and draft shopping carts

B. **Filter Draft Carts**: Can filter draft carts by cart name, cart number, date created, cart type and cart status.
   - A. Cart Name: Cart names default to “date cart created + EID + # sequence”. It is recommended shoppers rename cart so it's easily distinguishable.
   - B. Cart Number: Cart numbers are automatically generated when a new cart is created.
   - C. Date Created
   - D. Cart Types: N/A. All carts in BearBuy are “Normal”
   - E. Cart Status:
     - A. Not returned – cart is unassigned and has not been submitted.
     - B. Approver Returned – cart submitted but returned
     - C. Assignee Returned – cart assigned but returned (has not been submitted).

C. **ACTIVE sticker**: Your active cart will be identified by an icon. Shoppers can only have 1 active cart at a time.

D. **Returned Carts**: Returned carts are identified by a green arrow icon ( ). Hovering over the icon will also display “Returned Cart” text.

E. **Action**: Available actions include, View, Activate and Delete
Cart Management – Assigned Carts

From the **Assigned carts** tab, you are able to see all **unsubmitted carts assigned to you** and **carts you have assigned to others**. As a cart authorizer, you will see the **ACTIVE** sticker associated to the assigned cart you are actively reviewing.

<table>
<thead>
<tr>
<th>Type</th>
<th>Cart Number</th>
<th>Shopping Cart Name</th>
<th>Date Created</th>
<th>Assigned To</th>
<th>Created By</th>
<th>Total</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>1062264</td>
<td>2013-11-20 019999...</td>
<td>11/20/2013</td>
<td>lian millward</td>
<td>BFS-TRAINING100 TEST</td>
<td>20.55 USD</td>
<td>View</td>
</tr>
<tr>
<td>Normal</td>
<td>1930090</td>
<td>CSP 17.2 TEST SCE...</td>
<td>7/12/2017</td>
<td>BFS-TRAINING100 TEST</td>
<td>BFS-TRAINING102 TEST</td>
<td>2,500.00 USD</td>
<td>View</td>
</tr>
<tr>
<td>Normal</td>
<td>1949728</td>
<td>2017-07-20 Carla 02</td>
<td>7/20/2017</td>
<td>BFS-TRAINING100 TEST</td>
<td>Carla Prado</td>
<td>186.63 USD</td>
<td>View</td>
</tr>
</tbody>
</table>

A. **Assigned Carts**: Contains carts assigned to you by other shoppers and carts you’ve assigned to others.
B. **Assign Substitute**:
C. **Filter Assigned Carts**: Shoppers can filter their draft carts by cart name, cart number, date created, prepared for user and assigned to user
   A. Prepared for User – Individual who created cart
   B. Assigned to User – Individual currently assigned to cart (also known as Cart Authorizer)
D. **Assigned To**: Individual currently assigned to cart (also known as Cart Authorizer)
E. **Created By**: Individual who created cart
F. **Action**: Available actions include, View, Unassign (for carts assigned to others), Activate, Return (for carts assigned to me) and Delete