BearBuy: Basics for Shoppers Training

Supply Chain Management
Systems Solutions
Agenda

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- BearBuy: Terms & Concepts
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  - Documents
  - Data Privacy
- BearBuy: Procure to Pay
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  - Campus Buyers
  - Catalogs
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  - Checking Payment Status and Type
- Demo
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BearBuy: Terms & Concepts

Roles

- **Shopper**
  - UC Berkeley staff, faculty, active graduate students, and all other student employees are Shoppers.
  - Must have logged into BearBuy through Blu portal once to obtain access.
  - Cannot self approve as a requisition creator or chartfield approver.

- **Requisition Creator**
  - Reviews requisitions for accuracy and policy compliance.
  - Can edit requisition fields (Org Node, Ship to Address, Final Destination, Additional Authorizers ½, 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: Terms & Concepts
Roles Continued...

<table>
<thead>
<tr>
<th>Role</th>
<th>Action</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopper</td>
<td>Enters requests into BearBuy via shopping cart to submit or assign to Cart Authorizer (cannot self approve as a requisition creator or chartfield approver).</td>
<td>Individual who has authority to submit orders within department if additional authorization is needed or if shopper is not authorized.</td>
</tr>
<tr>
<td>Cart Authorizer</td>
<td>Receives assigned shopping cart to review and submit cart for order.</td>
<td>Individual who reviews requisition for accuracy and policy compliance.</td>
</tr>
<tr>
<td>Requisition Creator</td>
<td>Reviews and confirms supporting docs and PO information.</td>
<td>Individual(s) who review requisition if the department chooses. Usually Principle Investigators.</td>
</tr>
<tr>
<td>Additional Authorization</td>
<td>Requisitions can be routed to Additional Authorizers (up to 2) depending on department requirements (cannot edit requisition, can only approve or return).</td>
<td>Department Org Node Approval required if orders are over $1k (cannot edit requisition, can only approve or return).</td>
</tr>
<tr>
<td>Approval(s)</td>
<td>Confirms all requisition information is accurate and complies with funding requirements.</td>
<td>Buyer approval is required for high dollar amounts and items requiring Buyer Intervention.</td>
</tr>
<tr>
<td>Supplier</td>
<td>Receives PO and fulfills goods/services.</td>
<td>Chartfield 1 and Chartfield 2 is required if configured with Chart of Accounts.</td>
</tr>
</tbody>
</table>
BearBuy: Terms & Concepts

Functions

• 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, Ship to Address, and Bill to Address must be associated to the order.

• Header Level
  • Information populated at the top level that applies to each line on the transaction.
  • Helpful Hint: If you need to split the chartstring at the header level, split it by the percentage (%) of Price, not by the amount of price.

<table>
<thead>
<tr>
<th>Account</th>
<th>Speedtype</th>
<th>Fund</th>
<th>Federal Funds</th>
<th>Department</th>
<th>Program Code</th>
<th>Chartfield1</th>
<th>Chartfield2</th>
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</thead>
<tbody>
<tr>
<td>50030</td>
<td>none</td>
<td>00000</td>
<td>No</td>
<td>21802</td>
<td>Inst Support &amp; General Admin</td>
<td>no value</td>
<td>no value</td>
</tr>
</tbody>
</table>

General Office Supplies
Campus General Funds

Helpful Hint: If you need to split the chartstring at the header level, split it by the percentage (%) of Price, not by the amount of price.

• Line Level
  • Information populated at the individual line level that only applies to one line.
  • Information populated at the line level will always supersede the header level information.

Product Description

<table>
<thead>
<tr>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>38AV5S</td>
<td>EA</td>
<td>9.12</td>
<td>1 EA</td>
<td>9.12 USD</td>
</tr>
</tbody>
</table>

Ballpoint Pen Metallic Blue

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General Office Supplies
Campus General Funds

Helpful Hint: If you need to split the chartstring at the header level, split it by the percentage (%) of Price, not by the amount of price.
BearBuy: Terms & Concepts

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).
    - BearBuy converts a Requisition to 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 to acknowledge receipt of goods/services.
When adding attachments and including information to your BearBuy Cart(s), please **DO NOT add any personal identifying information** (PII) such as:

- Anything that contains an individual’s name or initials combined with any of the following:
  - Social Security Number
  - Credit Card Number
  - Driver’s License or State Identification Card Number
  - Any type of medical/medical insurance information
  - Any personal financial account number
  - Date of Birth (MM/DD/YY)

- Similarly, an individual’s home address and family information also requires restricted access control.
A UC Purchase Order (PO) Number from BearBuy is required for ALL:
- Purchase Requests
- Orders
- Payments

Delegated campus departments are allowed to make BearBuy purchases for:
- Unrestricted goods
- Low risk services under $10,000.00 (including shipping and tax)

All requests for purchases should identify the Business Purpose for the purchase:
- What is being purchased?
- Why is it being purchased?
- How does the University benefit from this transaction?

Suppliers will not receive payments until a PO has been created and the invoice has been submitted through an Accounts Payable's approved method (email, Transcepta, electronically) and approved for payment in BearBuy.
• All requests for purchase or payment **must include:**
  - Description, Quantity, Price of the good/service
  - Shipping and Billing Addresses
  - Department’s Org Node
  - Chartstring identifying the funding source
  - Additional supporting documentation as required by the specific purchase

• All purchase and payment requests begin with a BearBuy shopping cart.
  - Departments may have internal processes on who provides the required data.
  - Shopping cart submission methods:
    - **Assigning** your cart to someone in your department with financial authority to complete the request by providing the chartstring(s)/additional information.
    - **Submitting** your cart directly into workflow for approval.
      - **Minimum submitting requirements:** Valid Org Node, Ship to and Bill to Addresses.
BearBuy: Procure to Pay
Campus Buyers

- Campus Buyers are individuals who have delegated authority to process complex high value transactions.

- Campus Buyers assist departments with procurement activities from planning through acquisition:
  - Select appropriate sources, including identification and management of suppliers.
  - Solicit competitive bids through requests for information, quotations, or proposals.
  - Negotiate and review terms and conditions with suppliers.
  - Assist departments with the creation of a Statement of Work (SOW) when appropriate for supplier services.
  - Sign contracts and agreements for goods and services in which departments do not have the authority to sign.

- Campus buyers are built into the BearBuy workflow automatically based on value and type of transaction. Departments can also request assistance by selecting the Buyer intervention button as needed.

- Campus buyers provide additional services to the campus community as requested to:
  - Analyze business operations, activities, and transactions to improve supplier performance and meet a department’s cost objectives.
  - Provide policy interpretation and compliance.
• **Catalogs** are the **easiest** method when purchasing! 😊

• There are two (2) types of Catalogs:
  • **Hosted**: Only includes specific contracted/frequently ordered items that can be retrieved using the product search bar or a catalog.
  • **Punchout**: Usually has more items that can be retrieved by selecting a punchout catalog which opens up a separate window directing you to the supplier’s catalog.

*Some suppliers have both hosted and punchout catalogs.*

• No additional documentation is needed when making **low value purchases** from catalog suppliers.

• Purchasing Threshold Routing:
  • **Items < $5,000** will directly dispatch the PO to the Supplier if all required fields are filled out.
  • **Items > $5,000** will route to a Requisition Creator and then to a Requisition Approver.
  • **Items > $100,000** will route to a Requisition Creator, then to a Requisition Approver, and also require an additional Buyer review.

*After the workflow steps are complete, the PO dispatches to the Supplier.*
Catalogs have additional features such as:

- The ability to view product details and save items as favorites.
- Side by side price comparisons.
- The ability for users to copy carts.
  - Please be aware that some Suppliers may not support this feature.
  - If copying a cart, it is recommended to review each sub-tab before submitting.
BearBuy: Procure to Pay

Forms

• Forms are used for every purchase that is NOT found in a catalog.
• Please be aware that ALL forms require certain documentation.
• Forms that are specific to transaction types are:
  • Non-Catalog Form
  • Service Order Request
  • Amount Only Form
  • Payment Request Form
  • After the Fact Form
  • BluCard Tracking Form
• Each form has a “when to use” description on it.
• Check out the Forms Matrix to determine what form you should use! 😊

Frequently Used Forms

Non-Catalog Form
Purchase Goods/Equipment

Service Order Request
Purchase Services/Contractors

Payment Request Form

Subaward - Non UC Recipient

Vehicle Charter Request
BUS Rental
BearBuy: Procure to Pay
How PO’s are Paid

• Please be advised that ALL PO’s require invoices for payment.

• Invoices can be sent via the following methods:
  • **Electronic (Preferred):**
    • All BearBuy Catalog suppliers should submit catalog order invoices via cXML.
    • Non-catalog suppliers submitting more than 25 invoices per year should register with Transcepta, our invoicing partner.
  • **Manual:**
    • Submit invoices directly to the Accounts Payable Office preferably via e-mail ucinvoice@berkeley.edu.

• What Auto Pays:
  • Catalog/contracted purchases less than $5k as long as the invoice matches the PO on auto payment.
  • Non-catalog purchases less than $1k as long as the invoice matches the PO on auto payment.

• What Auto Flips:
  • Payment Request Form – please note that this is a check request form, not a PO.
  • After the Fact Form

• For any invoice and payment inquiries, please contact Accounts Payable at disburse@berkeley.edu and visit their website for more information and detailed instructions.
BearBuy: Procure to Pay
Checking Payment Status and Type

- To determine if your order has been paid for, search for the PO in BearBuy and check the **Voucher** tab.
- If your PO has a voucher listed, the invoice is in the payment approval process or payment has been completed.
After searching for your PO in BearBuy and clicking on the **Voucher tab**, click on the voucher listed.

A summary of the voucher will be displayed.

The **payment type** is listed under the **Address Section**.

The **payment status** is listed under the **Payment Information** section.

### Payment Information

- **Payment Method**: Default
- **Payment Message**: no value
- **Internal Payment Note**: no value

### Payment Status Details

- **Pay Status**: Paid
- **Handling Code**: no value
- **Record Date**: 10/3/2019
- **BFS Status / Payment No.**: Paid / 01450045

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**Bill To**

For inquiries: disburse@berkeley.edu

See instructions to e-mail invoices as attachments at: http://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors

2195 Hearst Avenue

Warren Hall

Ste 159
Demo Session
Resources & Support

- **BearBuy Website**

- **New Shoppers Quick Reference Guide** – Tips on setting up your default user settings, going shopping, managing your cart, utilizing the tabs in your reqs/PO’s, and creating a receipt.

- **BearBuy Help Desk**
  - #1 place to go to for support:
    - BearBuy information
    - Recommended best practices
    - Technical assistance
    - Policy related questions
    - Any other BearBuy related inquiries
  - **Contact Information**
    - Phone: 510-664-9000 Option 1, Option 2
    - Hours: Mon. – Fri. 8:00am to 5:00pm
    - Email: bearbuyhelp@berkeley.edu

- Interested in staying informed with BearBuy and other Supply Chain Management related information?
  - **Sign up** to receive our newsletters!
Questions?