BearBuy: Basics for Shoppers Training

Supply Chain Management
Systems Solutions
Agenda

• Introduction
• BearBuy: Terms & Concepts
  • Roles
  • Functions
  • Documents
  • Data Privacy
• BearBuy: Procure to Pay
  • Purchasing Basics
  • Campus Buyers
  • Catalogs
  • Forms
  • How PO’s are Paid
  • Checking Payment Status and Type
• Demo
• Resources & Support
• Q&A
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>
</tbody>
</table>
| Additional Authorization | Requisitions can be routed to Additional Authorizers (up to 2) depending on department requirements (cannot edit requisition, can only approve or return). | - Department Org Node Approval required if orders are over $1k (cannot edit requisition, can only approve or return).  
- Buyer approval is required for high dollar amounts and items requiring Buyer intervention.  
- Chartfield 1 and Chartfield 2 is required if configured with Chart of Accounts. |
| Approval(s)   | Confirms all requisition information is accurate and complies with funding requirements. | Reaches PO and fulfills goods/services. |
| Supplier      |                                                                                     |                                                                         |
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.

<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>
</tr>
</thead>
<tbody>
<tr>
<td>55030</td>
<td>none</td>
<td>66000</td>
<td>No</td>
<td>21935</td>
<td>72</td>
<td>no value</td>
<td>no value</td>
</tr>
<tr>
<td>General Office Supplies</td>
<td></td>
<td></td>
<td></td>
<td>FERRO CFO's Office</td>
<td>Inst Support &amp; General Admin</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Accounting Codes**

These values apply to all lines unless specified by line item.

<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>
</tr>
</thead>
<tbody>
<tr>
<td>55030</td>
<td>none</td>
<td>66000</td>
<td>No</td>
<td>21966</td>
<td>72</td>
<td>no value</td>
<td>no value</td>
</tr>
<tr>
<td>General Office Supplies</td>
<td></td>
<td></td>
<td></td>
<td>FERRO Purchasing</td>
<td>Inst Support &amp; General Admin</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• 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.

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Ballpoint Pen Metallic Blue</td>
<td>38AV55</td>
<td>EA</td>
<td>9.12</td>
<td>1 EA</td>
<td>9.12 USD</td>
</tr>
</tbody>
</table>

**Accounting Codes**

These values have been overridden for this line.

<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>
</tr>
</thead>
<tbody>
<tr>
<td>55030</td>
<td>none</td>
<td>66000</td>
<td>No</td>
<td>21966</td>
<td>72</td>
<td>no value</td>
<td>no value</td>
</tr>
<tr>
<td>General Office Supplies</td>
<td></td>
<td></td>
<td></td>
<td>FERRO Purchasing</td>
<td>Inst Support &amp; General Admin</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.
BearBuy: Procure to Pay
Purchasing Basics

- **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.
Purchasing Basics Continued…

- 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.

02/24/2020 | SCM, Systems Solutions
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! 😊
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.
Demo Session
Resources & Support

- BearBuy Website: supplychain.berkeley.edu/bearbuy
- 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
Questions?