BearBuy: Basics for Shoppers Training

Supply Chain Management
Systems Solutions
Agenda

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  • Documents
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• BearBuy: Procure to Pay
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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</td>
<td>Individual who has authority to submit orders within department if</td>
</tr>
<tr>
<td></td>
<td>Cart Authorizer</td>
<td>additional authorization is needed or if shopper is not authorized.</td>
</tr>
<tr>
<td></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></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></td>
<td>Requisitions can be routed to Additional Authorizers (up to 2)</td>
<td>Department Org Node Approval required if orders are over $1k (cannot edit requisition, can only approve or return).</td>
</tr>
<tr>
<td></td>
<td>depending on department requirements (cannot edit requisition, can only</td>
<td>Buyer approval is required for high dollar amounts and items requiring Buyer Intervention.</td>
</tr>
<tr>
<td></td>
<td>approve or return).</td>
<td>Chartfield 1 and Chartfield 2 is required if configured with Chart of Accounts.</td>
</tr>
<tr>
<td>Supplier</td>
<td>Receives PO and fulfills goods/services.</td>
<td></td>
</tr>
</tbody>
</table>

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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.

- **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.

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**Accounting Codes**

<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>66960</td>
<td>No</td>
<td>21935</td>
<td>FERRO CPOs Office</td>
<td>no value</td>
<td>no value</td>
</tr>
</tbody>
</table>

General Office Supplies

Campus General Funds

**Information**

- **Catalog No**: 38AV55
- **Size / Packaging**: EA
- **Unit Price**: $9.12
- **Quantity**: 1 EA
- **Ext. Price**: $9.12 USD

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**More Information**

**GRAINGER INC**

001, BFG ID: 0000002079

444 DOOLITTLE DRIVE, SAN LEANDRO, CA 94577 US

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**Berkeley**

UNIVERSITY OF CALIFORNIA

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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.
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.
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.
BearBuy: Procure to Pay
Catalogs

• **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.
BearBuy: Procure to Pay
Checking Payment Status and Type Continued...

- 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.

[Image of a webpage showing a voucher with details]

**Invoice Information**
- **Supplier Name**: SHI INTERNATIONAL CORP
- **Supplier No.**: 0000696761
- **Voucher Name**: 2019-09-13 1016297723
- **Voucher Number**: S0622616
- **Voucher Owner**: Riza Casal
- **Supplier Invoice No.**: B10541176
- **Invoice Date**: 9/9/2019
- **Accounting Date**: 9/13/2019
- **Vouchered By**: YENNY TJANDRA
- **MFG Model Number**: no value

**Address**
- **Remit To**: PO BOX 952121
  
  Dallas, TX 75395
- **United States**: Email remittance@shi.com
- **Phone**: 1-732-8686279
- **Fax**: 1-732-8059669
- **Address Id (Pay: EFT):** [W/H: NAI]
- **3rd Party Address ID**: 2

**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

**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
Demo Session
Resources & Support

- **BearBuy Website**
- **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?