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...

**Role**
- **Shopper**
  - Enters requests into BearBuy via shopping cart to submit or assign to Cart Authorizer (cannot self approve as a requisition creator or chartfield approver).

- **Cart Authorizer**
  - Receives assigned shopping cart to review and submit cart for order.

- **Requisition Creator**
  - Reviews and confirms supporting docs and PO information.

- **Additional Authorization**
  - Requisitions can be routed to Additional Authorizers (up to 2) depending on department requirements (cannot edit requisition, can only approve or return).

- **Approval(s)**
  - Confirms all requisition information is accurate and complies with funding requirements.

- **Supplier**
  - Receives PO and fulfills goods/services.

**Action**
- Individual who has authority to submit orders within department if additional authorization is needed or if shopper is not authorized.

- Individual who reviews requisition for accuracy and policy compliance.

- Individual(s) who review requisition if the department chooses. Usually Principle Investigators.

**Purpose**
- Department Org Noda 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.
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>
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<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Accounting Codes: Values vary by line.

• **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>
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</thead>
<tbody>
<tr>
<td>Ballpoint Pen Metallic Blue</td>
<td>38AV55</td>
<td>EA</td>
<td>9.12</td>
<td>1 EA</td>
<td>9.12 USD</td>
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</tbody>
</table>

Accounting Codes: 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>
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<td>21866</td>
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<td>General Office Supplies</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.
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.
BearBuy: Procure to Pay
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.
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.
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.

---

<table>
<thead>
<tr>
<th>Invoice Information</th>
<th>Addresses</th>
<th>Payment Information</th>
</tr>
</thead>
<tbody>
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<td>Supplier Name</td>
<td>Remit To</td>
<td>Payment Method</td>
</tr>
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<td>Supplier No.</td>
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<td>Default</td>
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</tr>
<tr>
<td>Voucher Number</td>
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<tr>
<td>Voucher Owner</td>
<td>Email <a href="mailto:remittance@shi.com">remittance@shi.com</a></td>
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<tr>
<td>Supplier Invoice No.</td>
<td>Phone 1-732-8686279-</td>
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</tr>
<tr>
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<td>Fax 1-732-8059669-</td>
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</tr>
<tr>
<td>Vouchered By</td>
<td>3rd Party Address ID 2</td>
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</tr>
<tr>
<td>MFG Model Number</td>
<td>Bill To</td>
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</tr>
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<td></td>
<td>For inquiries: <a href="mailto:disburse@berkeley.edu">disburse@berkeley.edu</a></td>
<td>Pay Status</td>
</tr>
<tr>
<td></td>
<td>See instructions to e-mail invoices as attachments at:</td>
<td>Paid</td>
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<tr>
<td></td>
<td><a href="http://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors">http://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors</a></td>
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</table>

*View/edit by line item...*
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

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