BearBuy: Basics for Shoppers Training

Supply Chain Management
Systems Solutions
Agenda

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BearBuy: Terms & Concepts

Roles

- **Shopper**
  - UC Berkeley staff, faculty, active graduate students, and all other student employees are Shoppers.
  - 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**
  - **Cart Authorizer**
  - **Requisition Creator**
  - **Additional Authorization**
  - **Approval(s)**
  - **Supplier**

- **Action**
  - **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.

- **Purpose**
  - **Shopper**
    - Individual who has authority to submit orders within department if additional authorization is needed or if shopper is not authorized.
  - **Cart Authorizer**
    - Individual who reviews requisition for accuracy and policy compliance.
  - **Requisition Creator**
    - Individual(s) who review requisition if the department chooses. Usually Principal Investigators.

- **Notes**
  - Department Org Nodes 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.

• **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.
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.
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.
**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.

![Invoices/Vouchers](image)
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.

![BearBuy screenshot](image)
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?