# BearBuy: Basics for Shoppers Training

Supply Chain Management

Systems Solutions

Berkeley
UNIVERSITY OF CALIFORNIA

# Agenda

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  - Functions
  - Documents
  - Data Privacy
- BearBuy: Procure to Pay
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  - Campus Buyers
  - Catalogs
  - Forms
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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.
  - 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

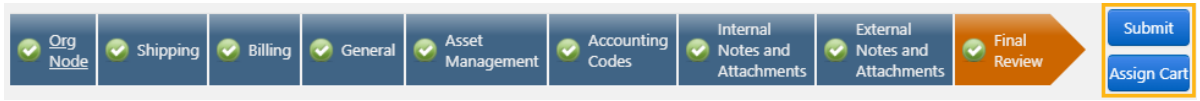
## Roles Continued…

| | Required | Optional | If Required | Optional | If Required | |
|---|---|---|---|---|---|---|
| **Role** | **Shopper** | | **Cart Authorizer** | | **Requisition Creator** | **Additional Authorization** | **Approval(s)** | **Supplier** |
| **Action** | Enters requests into BearBuy via shopping cart to submit or assign to Cart Authorizer (cannot self approve as a requisition creator or chartfield approver). | Receives assigned shopping cart to review and submit cart for order. | Reviews and confirms supporting docs and PO information. | Requisitions can be routed to Additional Authorizers (up to 2) depending on department requirements (cannot edit requisition, can only approve or return). | Confirms all requisition information is accurate and complies with funding requirements. | Receives PO and fulfills goods/services. |
| **Purpose** | | 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. | • Department Org Node Approval required if orders are over $1k (cannot edit requisition, can only approve or return).<br>• Buyer approval is required for high dollar amounts and items requiring Buyer intervention.<br>• Chartfield 1 and Charfield 2 is required if configured with Chart of Accounts. | |

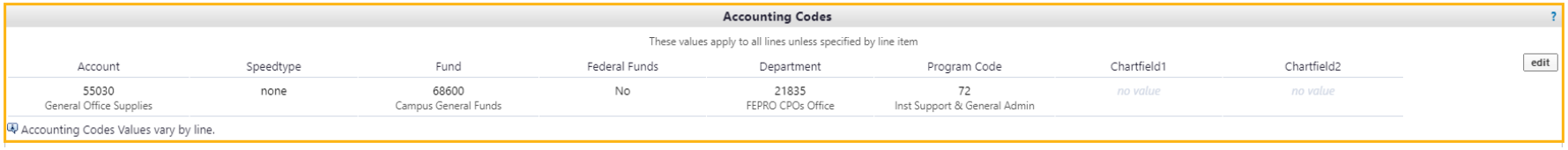
# BearBuy: Terms & Concepts

## Functions

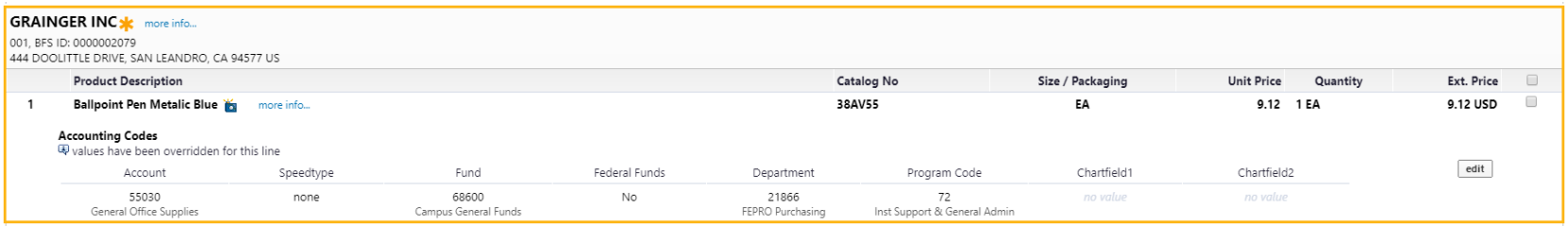
- **Assign**
  - Refers to the action when a shopping cart is routed to another Shopper for authorization prior to the creation of the requisition.
  - Second Shopper is referred to as the **Cart Authorizer**.
- **Submit**
  - Refers to the BearBuy action required (clicking the **Submit** button) and 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.

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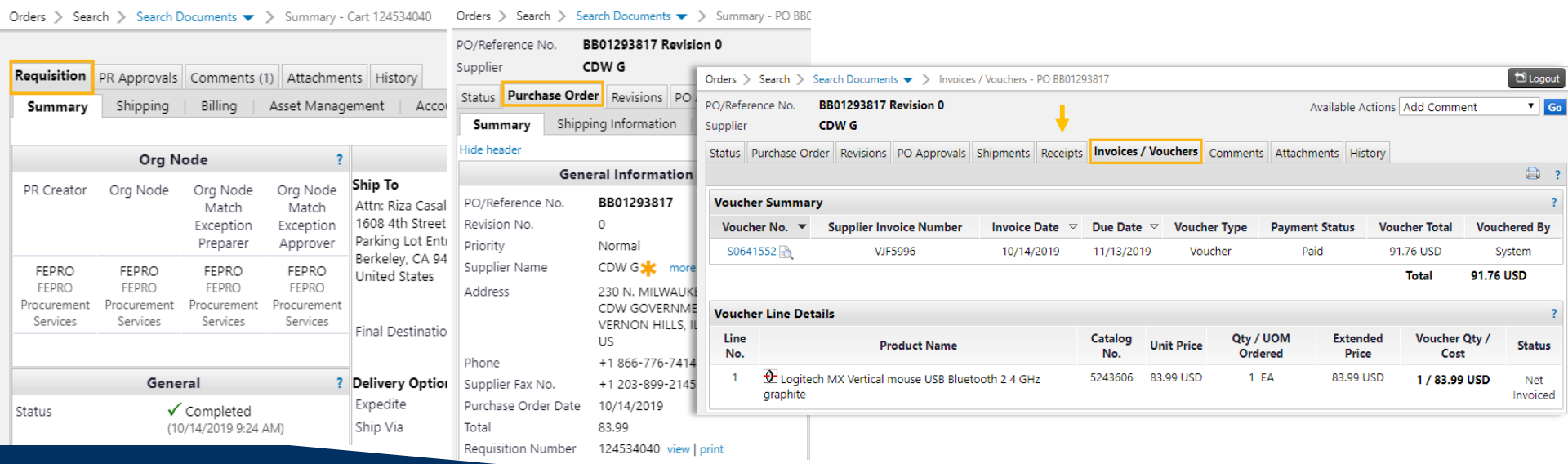
# BearBuy: Terms & Concepts

## 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](#).



# BearBuy: Terms & Concepts

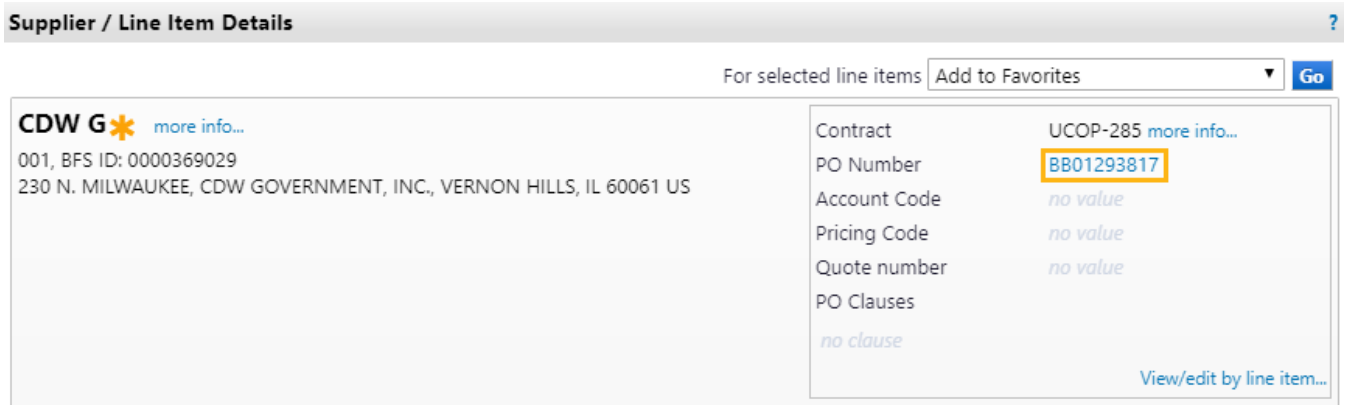
## Data Privacy

- 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.

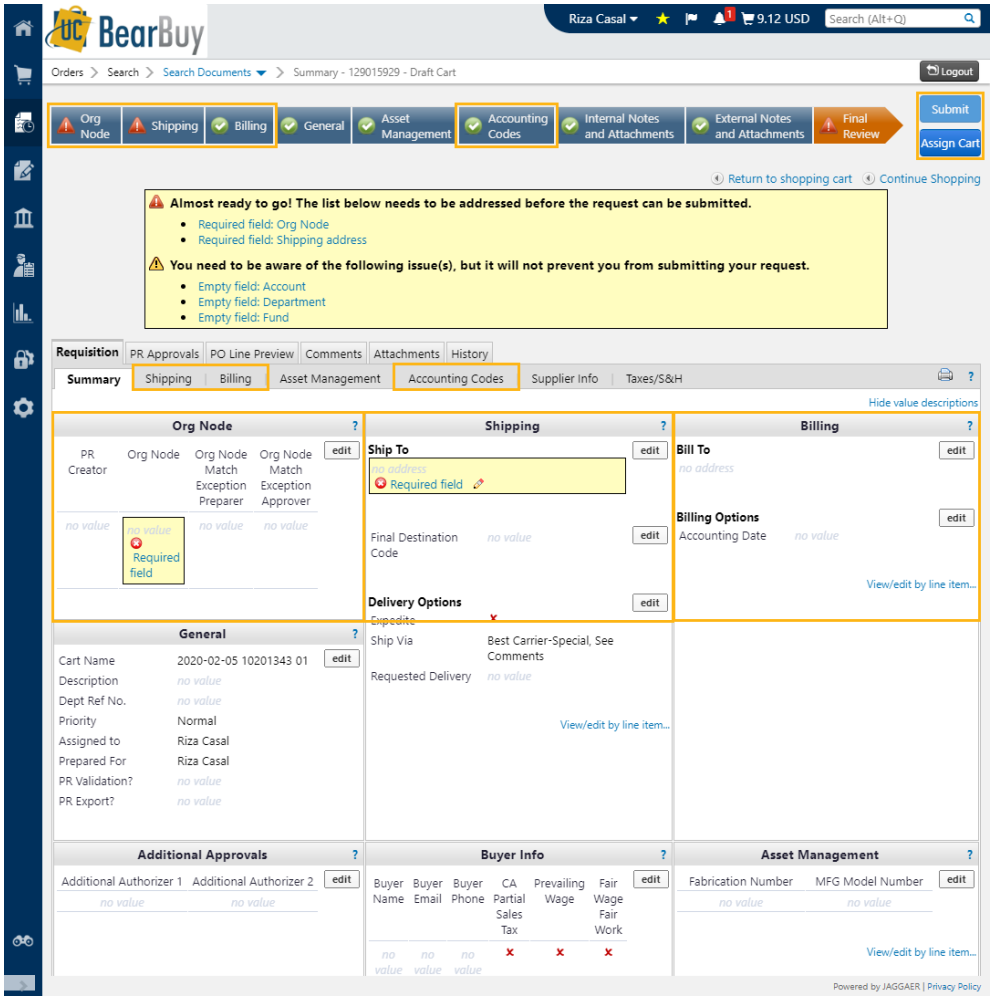


# BearBuy: Procure to Pay

## 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.

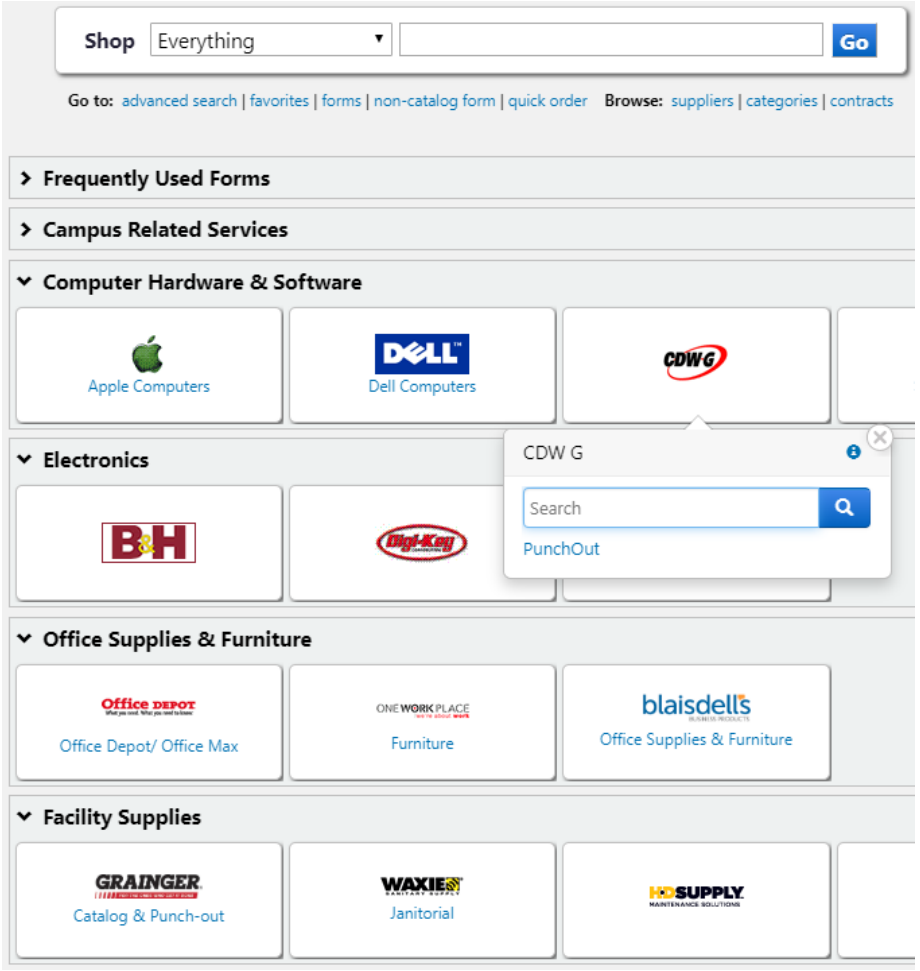
# BearBuy: Procure to Pay

## 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.

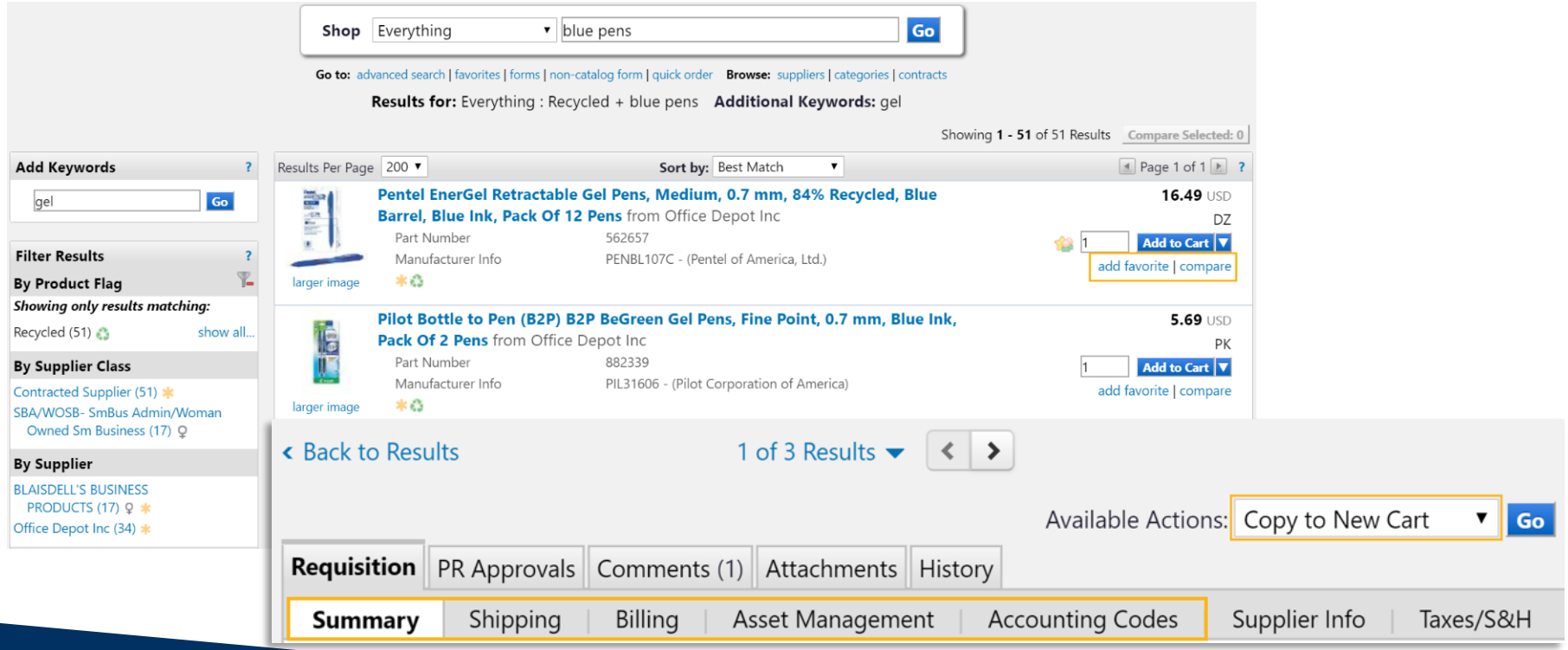
  *After the workflow steps are complete, the PO dispatches to the Supplier.



# BearBuy: Procure to Pay

## Catalogs Continued…

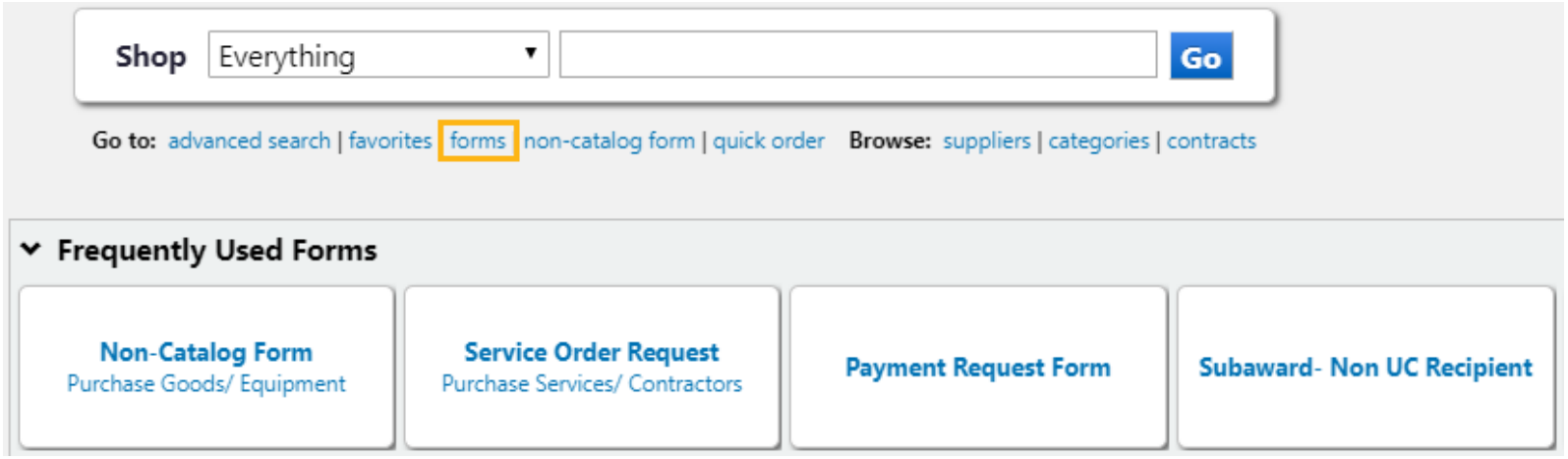
- Catalogs have additional features such as:
  - The ability to view product details and save items as favorites.
  - Side by side price comparisons.
  - The ability for users to copy carts.
    - Please be aware that some *Suppliers may not support this feature*.
    - If copying a cart, it is recommended 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.

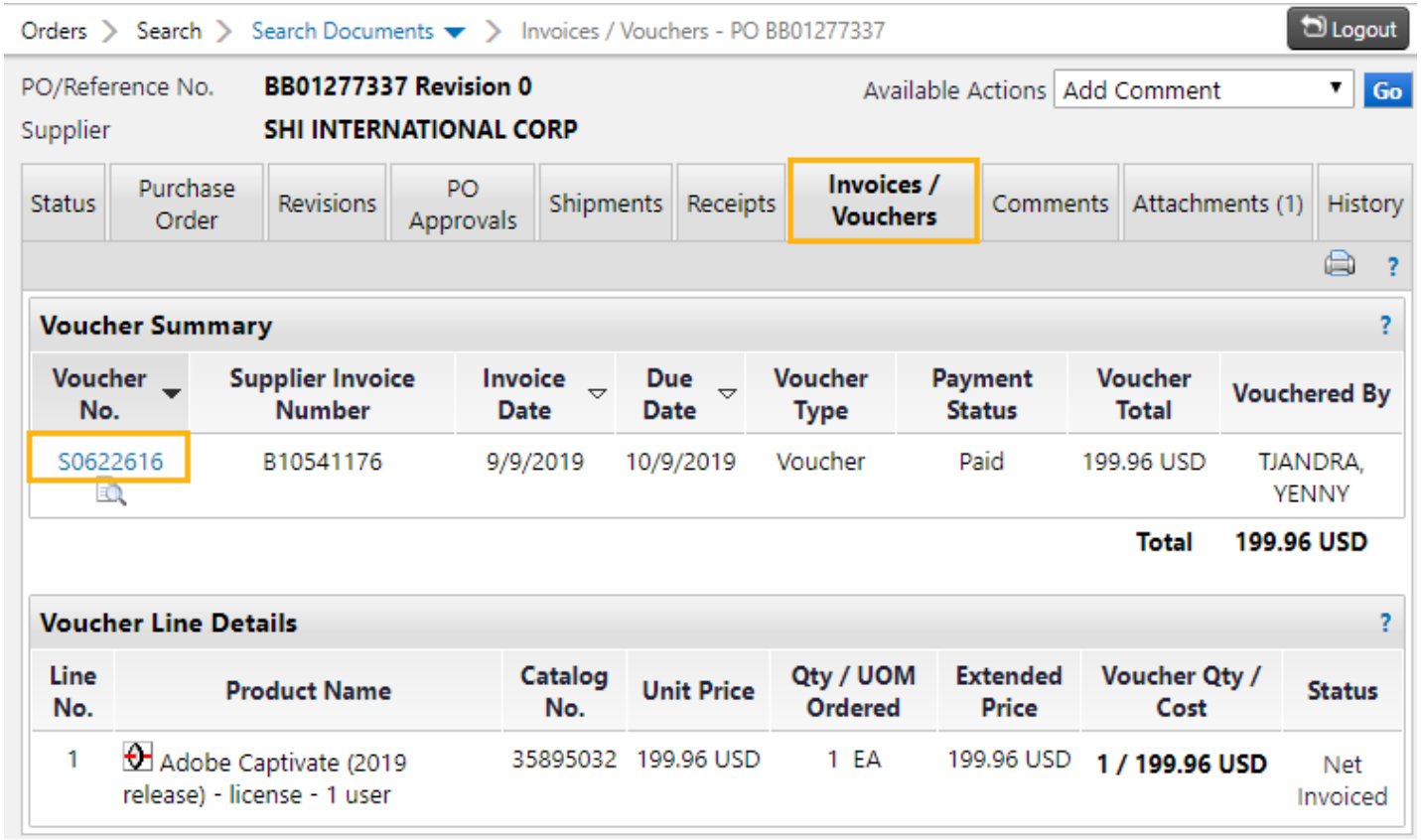
- What Auto Flips:
  - Payment Request Form – please note that this is a check request form, not a PO.
  - After the Fact Form

- 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

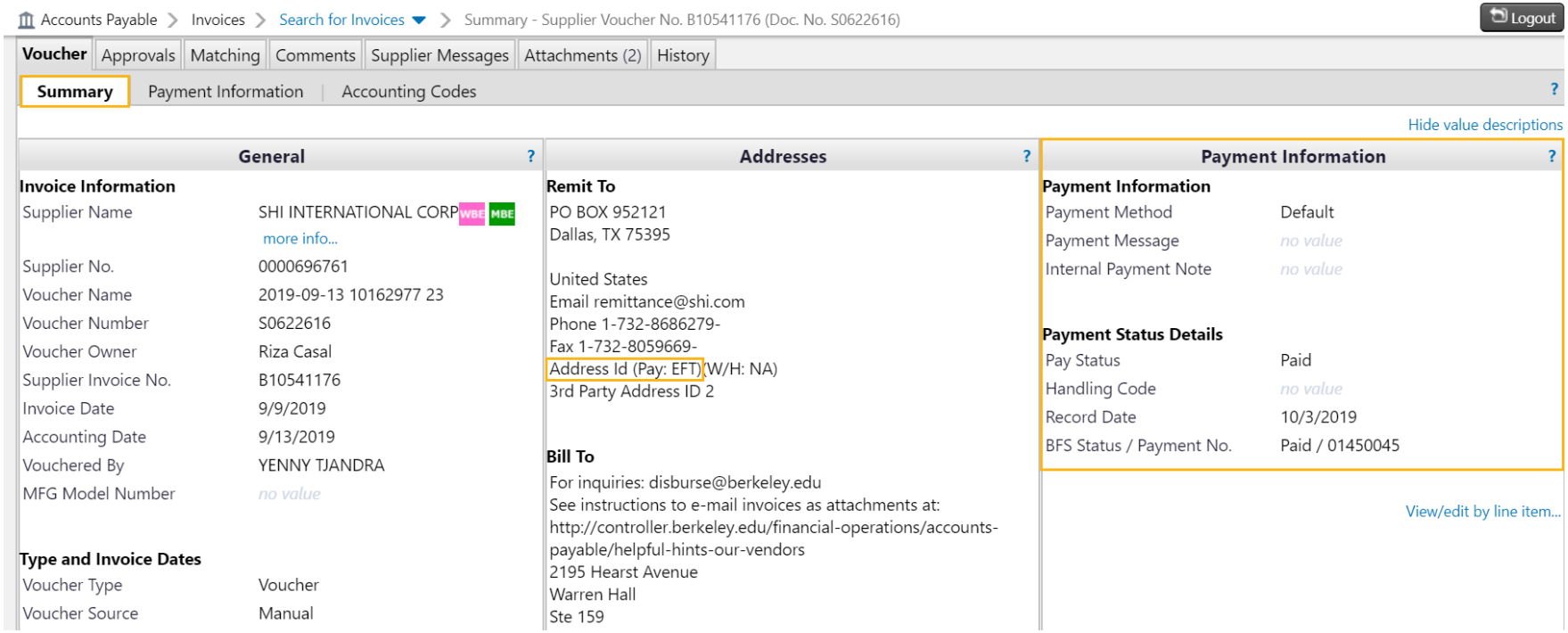
- To determine if your order has been paid for, search for the PO in BearBuy and check the **Voucher** tab.
- If your PO has a voucher listed, the invoice is in the payment approval process or payment has been completed.



# 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.



# 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?