Bears That Buy Town Hall
July 11, 2014

Agenda

• What’s New With BearBuy?
• 20-30 Webinar Series Overview
• BearBuy System Enhancement Requests
• Simplifying & Consolidating Forms
• Cal Answers Procure-to-Pay reports
• BearBuy Resources and Support
• Questions and Answers
Department Name Change

To better align with our activities on the UCSF and UC Berkeley campuses, Campus Procurement and Contracting (UCSF), Procurement Services (UC Berkeley), and Distribution, Storage and Mail (UCSF) are pleased to announce that effective May 15, 2014, the new unified department name will be Supply Chain Management (or SCM in acronym).

This change allows us to more closely align our department identity with the services provided to the UC Berkeley and UCSF campuses.

What this means for BearBuy?

• No BearBuy functionality or ownership has changed. The only thing that has changed is the name of the department that supports the eProcurement system.

*We are now Supply Chain Management, Operations & Technology*

WHAT’S NEW WITH BEARBUY?
14.2 Release

Every year there are three system-wide enhancements that are made to the BearBuy eProcurement system. The 14.2 SciQuest Product release will be available in the production environment starting July 20, 2014.

- New Supplier Management menu
  - No longer imbedded in Site Administration menu slide-out
- New Customized Document Search Export reports
  - Document Exports can be customized to export a specific set of export fields. This will provide cleaner data exports, a faster report generation time and the ability to save custom export definitions.
- Enhanced Cart Assign email
  - New cart number, Business unit, and department fields
- New ‘Save’ notifications
  - Updated “Changes Saved” for clarity
  - Applies to edited forms in a cart and in workflow

14.2 Release Key Dates

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Date and Time</th>
<th>Description and Detail</th>
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<tbody>
<tr>
<td>Live 14.2 Webinar Release</td>
<td>July 18th, 10-11 AM</td>
<td>The primary goal of this webinar is to introduce all users to the new functionality and features that come with the 14.2 release.</td>
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<td><a href="https://cc.readytalk.com/r/gmzuphp530lb&amp;eom">https://cc.readytalk.com/r/gmzuphp530lb&amp;eom</a></td>
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<td>Recommended audience: Shoppers, Requisition Creators, and all Approvers.</td>
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<tr>
<td>14.2 Updated training material</td>
<td>July 18th</td>
<td>New and updated resources affected by the 14.2 release will be available on our BearBuy Instructional Resources page.</td>
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<td><a href="http://procurement.berkeley.edu/bearbuy/instructional-resources">http://procurement.berkeley.edu/bearbuy/instructional-resources</a></td>
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<tr>
<td>BearBuy unavailable</td>
<td>July 18th, 9 pm until 21st 6 am</td>
<td>All users will not be able to access BearBuy during this time period as the new features will be migrated into the system.</td>
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<tr>
<td>14.2 features available in BearBuy</td>
<td>July 21st</td>
<td>This date indicates when the features and functionality associated with 14.2 will be available in BearBuy</td>
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New Catalogs in BearBuy

- Since January 2014 new catalogs have been added. The addition of new catalogs provides the opportunity to receive competitive pricing from all our catalog vendors as well as the ability to provide a more inclusive shopping experience to campus.

- New Catalogs Include:
  - Sigma (Oligos)
  - America To Go
  - New England Bio

- On the road map this year:
  - Cardinal Health (limited to UHS only)
  - HD Supply

20-30 WEBINAR SERIES OVERVIEW
BearBuy 20-30 Webinar Series

On April 30th Operations & Technology launching a 20-30 BearBuy Webinar Training Series. The goal of the 20-30 series is to provide greater insight on BearBuy process and procedures based on system functionality over the course of 20 unique webinars.

Each webinar session is tailored to provide a short in depth review of a specific topic/issue. Each session is scheduled for 30 minutes (15 for concepts and functionality overview and 15 for questions).

Since it’s inception, we’ve had 6 successful session, spanning across all areas within BearBuy.

- Session 1: After The Fact vs Payment Request Form
- Session 2: Top 3 Change Orders and How to Avoid Them
- Session 3: How To Resolve A Match Exception
- Session 4: Researching POs in Preparation For Fiscal Close
- Session 5: Non-Catalog Form and It’s Many Uses
- Session 6: Receiving in BearBuy – Why Everyone Should Be Doing It!

BearBuy 20-30 Webinar Series

20-30 Webinar Stats

<table>
<thead>
<tr>
<th>Session</th>
<th>Attendance</th>
<th>Unique Depts Represented</th>
<th>Unique Roles Represented</th>
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<tbody>
<tr>
<td>Session 1</td>
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<tr>
<td>Session 5</td>
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</tbody>
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BearBuy 20-30 Webinar Series

Attendance

0 2 4 6 8 10 12 14 16 18
Session 1 Session 2 Session 3 Session 4 Session 5

BEARBUY SYSTEM ENHANCEMENT REQUESTS
Enhancement Request Process

If you have suggestions for how BearBuy could be improved please submit a BearBuy Help Desk ticket and include a business justification explaining how the enhancement would benefit you or your department.

- Enhancement tickets are reviewed on a quarterly basis and tracked
  - User education vs true enhancement
  - Workarounds suggested

- A true SciQuest enhancement must benefit the campus or majority of users

- UCB and UCSF combine enhancement requests and submit them to SciQuest for review

- SciQuest evaluates enhancement requests submitted from all campuses and determines which ones are most beneficial and feasible and includes them in the system release

SIMPLIFYING & CONSOLIDATING FORMS
Forms Consolidation Project

• Background
  – Use of form types does not necessarily require justification or indicate failure to comply with policy.
  – There is a risk that transactions may not be routed and special approvals may not be obtained for those transactions not submitted on forms requiring special approvals.

• Scope
  – By September 30, 2014, have already identified which forms in BearBuy can be consolidated based on workflow, usage and associated UCB/UCOP policy. The identification of which forms can be consolidated will be made by the project core team members with input from various client focus groups.

• Contact
  – Carla Prado, cprado@berkeley.edu

CAL ANSWERS PROCUREMENT-TO-PAY REPORTS
Cal Answers

- Cal Answers is available for BearBuy reporting needs
  - [http://calanswers.berkeley.edu/](http://calanswers.berkeley.edu/)

- Recent June 2014 upgrade included enhancements to:
  - New browser options
  - Faster dashboard response
  - New features and new look
    - Favorites menu
    - Reset button options: default values and clear all

Forms Usage

- Cal Answers > Procure to Pay > Spend > Spend by Form Type
  - Compare forms you use to make purchases compared to the rest of campus
  - The report highlights two Form Types which campus is encouraged to use less often
    - After the Fact PO
    - Payment Request Form
  - Results can be filtered by date range, Org Node, supplier and the Chart of Accounts
RESOURCES AND SUPPORT

Online Resources

• The BearBuy website is the source for the most up to date news, announcements and training resources
  – procurement.berkeley.edu/bearbuy.

• BearBuy YouTube Channel - Short demos videos!
  – youtube.com/user/BearBuyProcurement.
  – Subscribe to receive notifications when new videos are posted.
Help Desk

• BearBuy Help Desk #1 place to stop for help:
  o BearBuy information (about BearBuy),
  o Recommended best practices,
  o Technical assistance,
  o Policy related questions, and
  o Much more!

• Contact the BearBuy help desk!
  • (510) 664-9000 Option 1, Option 2, Option 1
  • Mon-Fri 8 AM to 5PM
  • Email BearBuy Help (bearbuyhelp@berkeley.edu)

Questions and Answers!