# BCMS Training Guide

## for Department Contract Coordinators

available at:
**http://bcms.berkeley.edu/**

**Berkeley**
UNIVERSITY OF CALIFORNIA

# Table of Contents

*Note: "Dashboards" shown within the Training Guide are examples only. Each user will view a unique dashboard upon log in.*

# Logging In

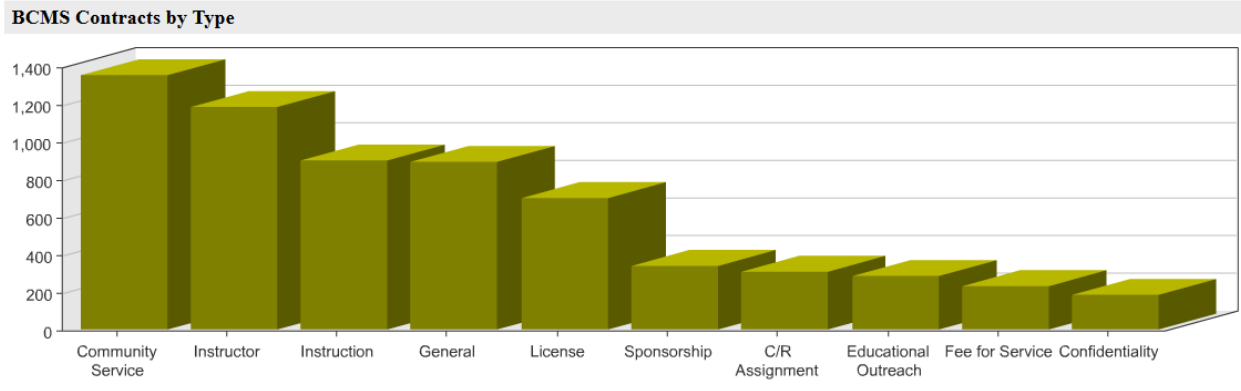1. To get to the BCMS site, go to: http://bcms.berkeley.edu/. For additional information, go to: http://bcbp.berkeley.edu/business-contracts/getting-started-bcms.
2. Choose "Login" from the upper right hand corner and login using your CalNet ID and password
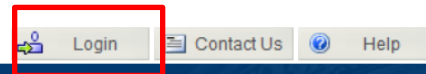
# BCMS Dashboard

1. After logging in, you will be taken to the dashboard shown below
2. You'll see that "Requests" and "Contracts" are now consolidated into "Projects"
3. Requests that are pending your approval will appear under "Attention Items" – click on the link to be taken to the approval page
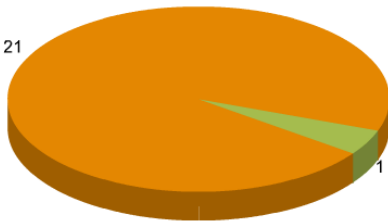
# Review a New Project that is Pending Your Approval

1. This page will automatically populate with Projects that are pending your approval
2. To review a pending project request, click on the Project and click "Review Project"

BCMS Training Guide – Department Contract Coordinator

3. Please be sure to review all of the tabs
4. You should be able to see and edit all of the Requester's/Preparer's inputs
5. The due date should be realistic – depending upon staff availability and complexity of agreement, turnaround time will vary

6. Review the:
   a. "Services Requested of BCBP"
   b.  "Risk/Liability/Concern"
   c. Reporting or applicable compliance requirements that need to be considered
   d. Government provisions (e.g., FAR clauses) in the contract, if there are any

**Services Requested of BCBP**
☑ Draft Agreement  ☐ Review Agreement  ☐ Create Template  ☐ Other Services
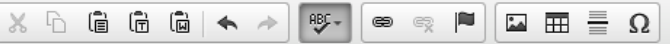**Services Note**

test

body  p

**Risk/Liability/Concerns**
☑ This Contract has risk

Please detail what could go wrong, if anything, from a strategic or operational perspective

test

body  p

Please detail any reporting or applicable compliance requirements that need to be considered

test

body  p

☐ Does this Contract include government provisions?

7. Review the "Estimated Financial Impact" of the project as well as any financial notes. This information is critical – please ensure that this information is as accurate as possible.
    a. **Incoming funds:** University receiving money
    b. **Outgoing funds:** University paying money
    c. **Total contract value:** no-dollar agreement, but the goods/services involved have a value (i.e., cost) associated with them
8. When you click "Save & Continue," you will automatically be taken to the next tab

**Estimated Financial Impact**

| Incoming Funds | | Value of Incoming Goods/Services | |
| Outgoing Funds | | Value of Outgoing Goods/Services | |

☐ Have you completed the **UBIT survey**? Revenue agreements may be subject to UBIT.

**Financial Note**

**Project Note**

Save & Continue

# Attach New Project Documents

1. Please review all documents that have been uploaded
2. When you have finished your review of all documents, click "Continue" to proceed to the next tab
3. If you need to add a new document, click "Add Document"
4. If your project is an amendment, upload the original agreement as well and reference it using the BCMS number (or Project ID)

5. Complete all fields in red
6. Check the "Return Executed Original to Dept" box if you would like BCBP to send you one or more originals via campus mail -once you check the box, you will be able to indicate how many originals you need.  <u>Note</u>: Unless required and requested, original agreements will not be provided.
7. Once you finish completing all fields, click "Upload Document"
8. Click on "Save Document" or your work won't be saved

Add Document                                                          Continue

**Document Name**

**Document Type**          --Select--            ☐ **Return Fully Executed Original to Dept.**

**Document Description**

Upload Document

**Document Note**

Styles            Format

Save Document

# Add Points of Contact to a New Project

1. Please review all contacts that have been added – when you have finished your review, click "Continue" to proceed to the next tab
2. Click "Add UCB Contact" to add a UCB Contact (e.g., other people in the Department who need access to the Project)
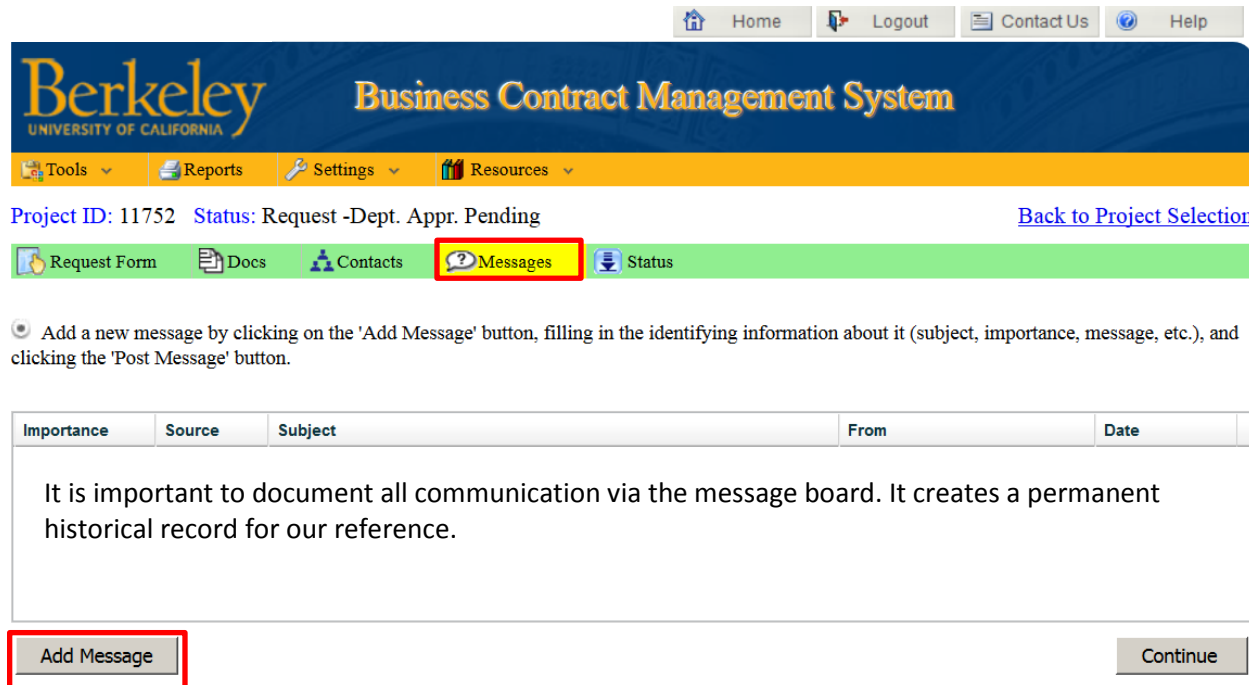3. Click "Add Non-UCB Contact" to add a Non-UCB Contact (e.g., the other party)

4. When you click "Add UCB Contact," you can search using first and/or last name
   a. The record will automatically populate
   b. Please note that it is important to complete this page, as our staff may need additional information or have questions to be answered
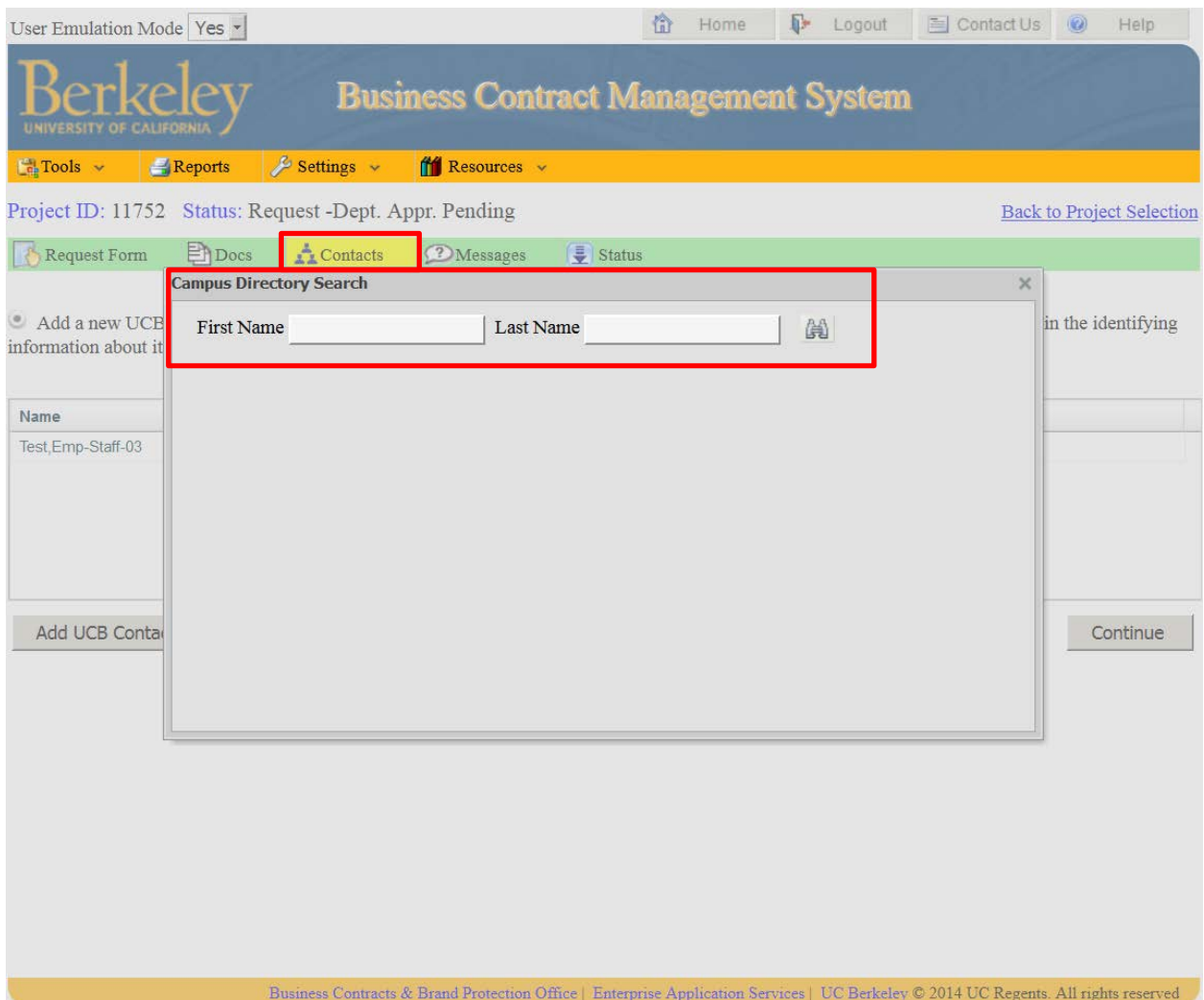
# Post a Communication Regarding a Project

1. To add a new message and provide BCBP with further background information, click "Add Message"

2. Complete all fields in red
    a. Subject
    b. Importance
3. Add your message in the message box
    a. **Please note** that you should always respond to a message from the Message Board using the Message Board, not a reply email – otherwise, your message will not become part of the historical record
4. Select one or more recipients (if you don't select a recipient, you won't be able to send your message)
5. The message will be sent through BCMS and an e-mail will be sent to the recipients designated
    a. Messages sent and replied to using this messaging system will be saved in the system
6. Click "Post Message" to post the message

# Submit the Request for BCBP Review

1. The page will populate based on the information previously provided in "General Info"
2. The "Requested By" section will list the Requester/Preparer who submitted the Project
3. To approve of and submit the request for BCBP Review, click "Approve Request" – once you approve, the Project will go to BCBP's pending acceptance queue
   a. **Please note** that BCBP cannot begin work until the Project has been approved by the Departmental Contract Coordinator
4. Be sure to note the BCMS number or "Project ID"

# Search for an Existing Project

1. You can search for a project by:
    a. Project ID (recommended)
    b. Project Name
    c. Other party
    d. Description
    e. Status
    f. Specialist
    g. Submitted date range
    h. Effective date range
    i. Expiration date range
2. The quickest method of searching for your project is to use the "Project ID" – no need to search using "%"
3. The status of the Project will change to "BCBP Acceptance Pending" upon your approval

# E-mail Inbox

1. Once your request has been accepted for review by BCBP, you will receive an e-mail notification
2. BCBP will not begin work on the project until the status is "Accepted for Review by BCBP"

**BCMS notification message.**   ☐   Inbox x

👤 **BCMSHelp@berkeley.edu**
   to me ▾

Dear Emp-Staff-03,

Your contract request status has been changed!

| Project ID | 11752 |
|---|---|
| Project Name | test |
| Other Party Name | test |
| Due Date | 09/22/2015 |
| Status | Accepted for Review by BCBP |
| Note | |

If you have any questions regarding this notification, please contact BCMSHelp by e-mail at BCMSHelp@berkeley.edu. BCMS users, you may use the following link to access BCMS: BCMS Home.

Sincerely,
The BCMS Team