

BCMS Training Guide

for Department Contract Coordinators

available at:

<http://bcms.berkeley.edu/>

Last updated November, 2015

This guide is also available online at <http://bcbp.berkeley.edu/business-contracts/getting-started-bcms>.

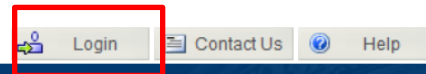
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Note: “Dashboards” shown within the Training Guide are examples only. Each user will view a unique dashboard upon log in.

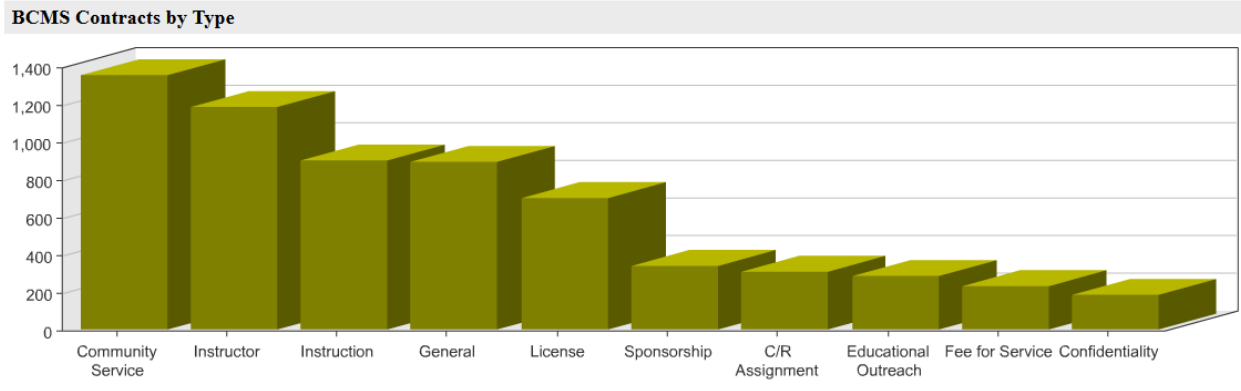
Logging In

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



Welcome to the Business Contracts Management System (BCMS)

Business Contract Management System provides UCB departments with an online status reporting tool to monitor the progress of a business contract during its various stages: from the receipt of the project by the Business Contracts and Brand Protection Office, through the drafting/negotiation /execution of the contract, and finally the administration of the contract by the Department.



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

Logout Contact Us Help

Berkeley UNIVERSITY OF CALIFORNIA **Business Contract Management System**

Tools Reports Settings Resources

Welcome Emp-Staff-05, to the Business Contracts Management System (BCMS)

- To submit/review Project, click [Projects](#).
- To ask us a question, click [Contact Us](#).
- To get online support, click [Help](#).
- To close your BCMS session, click [Logout](#).

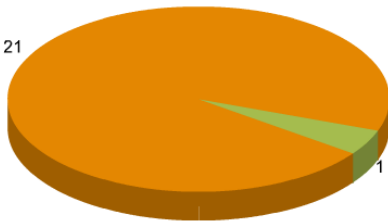
Attention Items

[My Approval Requested \(1\)](#)

Info Services & Technology department

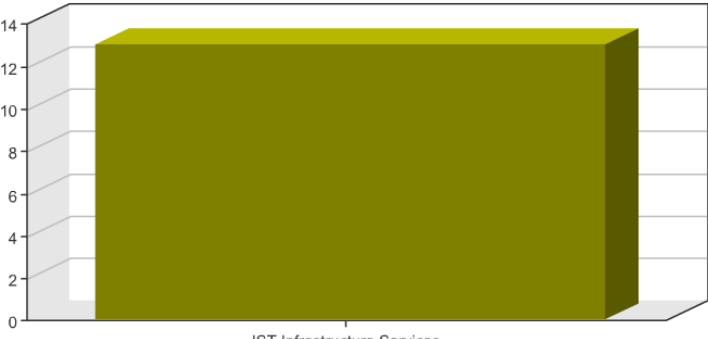
Department contracts by status

Completed Cancelled



Status	Count
Completed	21
Cancelled	1

Department contracts by group



Group	Count
IST Infrastructure Services	14

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"

Home Logout Contact Us Help

Berkeley UNIVERSITY OF CALIFORNIA **Business Contract Management System**

Tools Reports Settings Resources

Projects

Project ID: 11752 | Info Services & Technology | -Select Group- | Submitted Date Range: mm/dd/yyyy - mm/dd/yyyy | Search

Project Name: | Effective Date Range: mm/dd/yyyy - mm/dd/yyyy

Other Party: | Expiration Date Range: mm/dd/yyyy - mm/dd/yyyy

Descr/Note: | Clear

Status: --Select Contract-- | --Select Request-- | --Select Execution--

Specialist: Active Only | -Select Specialist-

1 record(s) found based on the selection criteria

ID	Department	Other Party	Sub. Date	Eff. Date	Exp. Date	Status
11752	Info Services & Technology	test	2015-09-22			BCBP Request -Dept. Appr. Pending

Review Project Copy Project Extract Data New Project

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

[Home](#) [Logout](#) [Contact Us](#) [Help](#)

Berkeley UNIVERSITY OF CALIFORNIA **Business Contract Management System**

[Tools](#) [Reports](#) [Settings](#) [Resources](#)

Project ID: 11752 Status: Request -Dept. Appr. Pending [Back to Project Selection](#)

Request Form Docs Contacts Messages Status

General Info

Requesting Dept. Info Services & Technology **Group** IST Infrastructure Services

Contract Stage New

Project Name test

Other Party Name test

Contract Due Date 09/22/2015


Project Description/Background

test

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

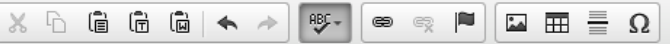


test

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

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, bulleted list, numbered list, link, unlink, image, table, link, and help. Below the toolbar are buttons for Bold (B), Italic (I), Strikethrough (S), Underline (I_x), bulleted list, numbered list, link, and unlink, followed by dropdown menus for Styles and Format.

Empty text area for the Financial Note.

Project Note

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, bulleted list, numbered list, link, unlink, image, table, link, and help. Below the toolbar are buttons for Bold (B), Italic (I), Strikethrough (S), Underline (I_x), bulleted list, numbered list, link, and unlink, followed by dropdown menus for Styles and Format.

Empty text area for the 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)

The screenshot shows the Berkeley Business Contract Management System interface. At the top, there is a navigation bar with links for Home, Logout, Contact Us, and Help. Below this is a blue header with the Berkeley University of California logo and the text 'Business Contract Management System'. A yellow navigation bar contains 'Tools', 'Reports', 'Settings', and 'Resources'. The main content area displays 'Project ID: 11752' and 'Status: Request -Dept. Appr. Pending', with a link to 'Back to Project Selection'. A green navigation bar includes 'Request Form', 'Docs', 'Contacts', 'Messages', and 'Status'. Below this is a radio button for 'Add a new document by clicking on the 'Add Document' button, filling in the identifying information about it (name, type, description, etc.), uploading document and clicking the 'Save Document' button.' Below the text is a table with columns: Name, Type, Description, Copies To Mail, and Update Date. At the bottom, two buttons are highlighted with red boxes: 'Add Document' on the left and 'Continue' on the right.

Project ID: 11752 Status: Request -Dept. Appr. Pending [Back to Project Selection](#)

Request Form Docs Contacts Messages Status

Add a new document by clicking on the 'Add Document' button, filling in the identifying information about it (name, type, description, etc.), uploading document and clicking the 'Save Document' button.

Name	Type	Description	Copies To Mail	Update Date
------	------	-------------	----------------	-------------

Add Document Continue

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. Note: 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

The screenshot shows a web form for document upload. At the top left is an "Add Document" button and at the top right is a "Continue" button. Below these are four input fields: "Document Name", "Document Type" (a dropdown menu with "--Select--"), "Document Description", and "Return Fully Executed Original to Dept." (a checkbox). A red box highlights the "Document Name", "Document Type", and "Document Description" fields. Another red box highlights the "Return Fully Executed Original to Dept." checkbox. Below the input fields is an "Upload Document" button. Underneath is a "Document Note" section with a rich text editor toolbar containing icons for undo, redo, bold, italic, strikethrough, bulleted list, numbered list, link, unlink, quote, styles, and format. Below the toolbar is a large text area for the note. At the bottom right of the form is a "Save Document" button, which is also highlighted with a red box.

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)

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Berkeley Business Contract Management System

[Tools](#) [Reports](#) [Settings](#) [Resources](#)

Project ID: 11752 Status: Request -Dept. Appr. Pending

[Back to Project Selection](#)

[Request Form](#) [Docs](#) [Contacts](#) [Messages](#) [Status](#)

● Add a new UCB or Non-UCB contact by clicking on either the 'Add UCB Contact' or 'Add NonUCB Contact' buttons, filling in the identifying information about it (name, email, phone, etc.), and clicking the 'Save Contact' button.

Name	Type	Phone	Email
Test_Emp-Staff-03	UCB Requestor	+1 510 643-1234	test-322584@berkeley.edu

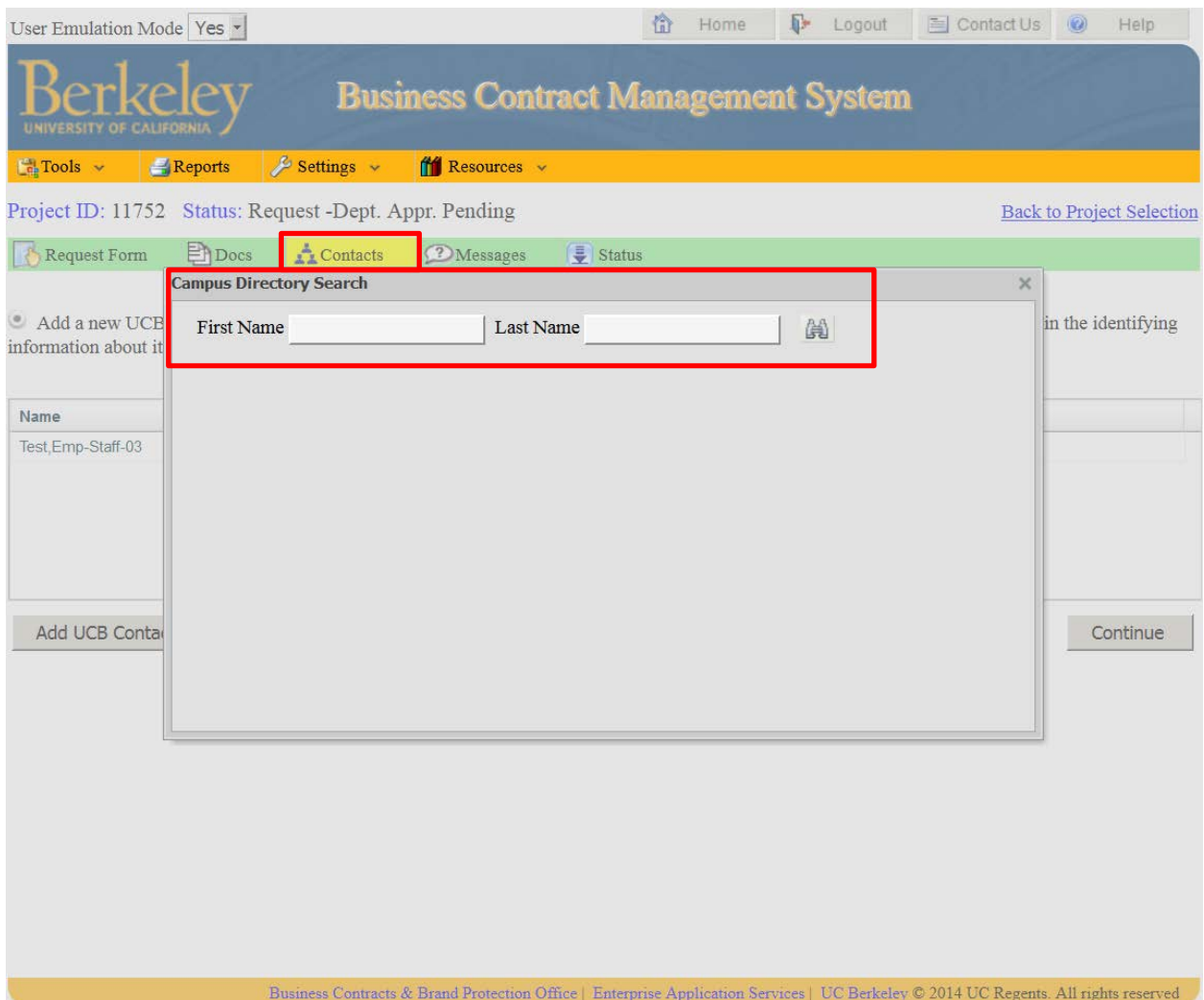
[Add UCB Contact](#)

[Add Non-UCB Contact](#)

[Delete Contact](#)

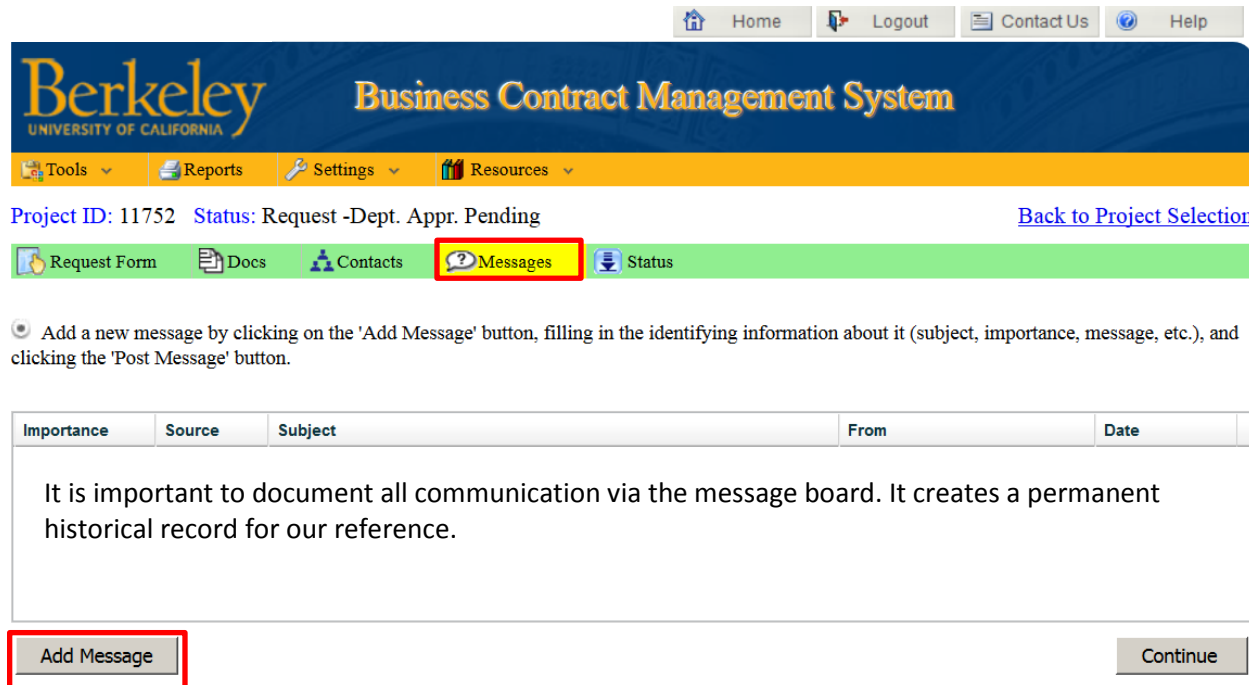
[Continue](#)

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”



The screenshot shows the Berkeley Business Contract Management System interface. At the top, there is a navigation bar with links for Home, Logout, Contact Us, and Help. Below this is the Berkeley University of California logo and the system name. A secondary navigation bar contains Tools, Reports, Settings, and Resources. The main content area displays 'Project ID: 11752' and 'Status: Request -Dept. Appr. Pending', with a 'Back to Project Selection' link. A green menu bar includes Request Form, Docs, Contacts, Messages (highlighted with a red box), and Status. Below the menu, a text input field contains the message: 'It is important to document all communication via the message board. It creates a permanent historical record for our reference.' At the bottom of the input field, the 'Add Message' button is highlighted with a red box, and a 'Continue' button is visible to its right.

Project ID: 11752 Status: Request -Dept. Appr. Pending [Back to Project Selection](#)

Request Form Docs Contacts **Messages** Status

It is important to document all communication via the message board. It creates a permanent historical record for our reference.

Add Message Continue

• Add a new message by clicking on the 'Add Message' button, filling in the identifying information about it (subject, importance, message, etc.), and clicking the 'Post Message' button.

Importance	Source	Subject	From	Date
It is important to document all communication via the message board. It creates a permanent historical record for our reference.				

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”

The screenshot displays the Berkeley Business Contract Management System interface. At the top, there are navigation links for Home, Logout, Contact Us, and Help. Below this is the Berkeley University of California logo and the system title. A navigation bar includes Tools, Reports, Settings, and Resources. The main content area shows project details for Project ID 11752, with a status of 'Request -Dept. Appr. Pending'. A 'Status' button is highlighted in yellow. The 'General Info' section includes fields for Requesting Dept., Contract Due Date, Project Name, and Other Party Name. The 'Requested By' section shows the requester's name, email, phone, and date. A rich text editor is present for notes. At the bottom right, there are 'Approve Request' and 'Deny Request' buttons, with the 'Approve Request' button highlighted in red.

Home Logout Contact Us Help

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Tools Reports Settings Resources

Project ID: 11752 Status: Request -Dept. Appr. Pending [Back to Project Selection](#)

Request Form Docs Contacts Messages Status

General Info

Requesting Dept. Info Services & Technology **Group** IST Infrastructure Services **Kind** BCBP Contract

Contract Due Date 09/22/2015 **Stage** New

Project Name test

Other Party Name test

Requested By

Name Emp-Staff-03 Test **Email** test-322584@berkeley.edu **Phone** +1 510 643-1234 **Date** 09/22/2015

Note

Approve Request Deny Request

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

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Projects

Project ID Info Services & Technology --Select Group--

Project Name

Other Party

Descr/Note

Status --Select Contract-- --Select Request-- --Select Execution--

Specialist Active Only --Select Specialist--

Submitted Date Range -

Effective Date Range -

Expiration Date Range -

● 1 record(s) found based on the selection criteria

ID	Department	Other Party	Sub. Date	Eff. Date	Exp. Date	Status
11752	Info Services & Technology	test	2015-09-22			BCBP Request -BCBP Acceptance...


● Requested action successfully completed

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