BCMS Training Guide

for Department Contract Requesters
and Department Contract Preparers

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

Berkeley
UNIVERSITY OF CALIFORNIA

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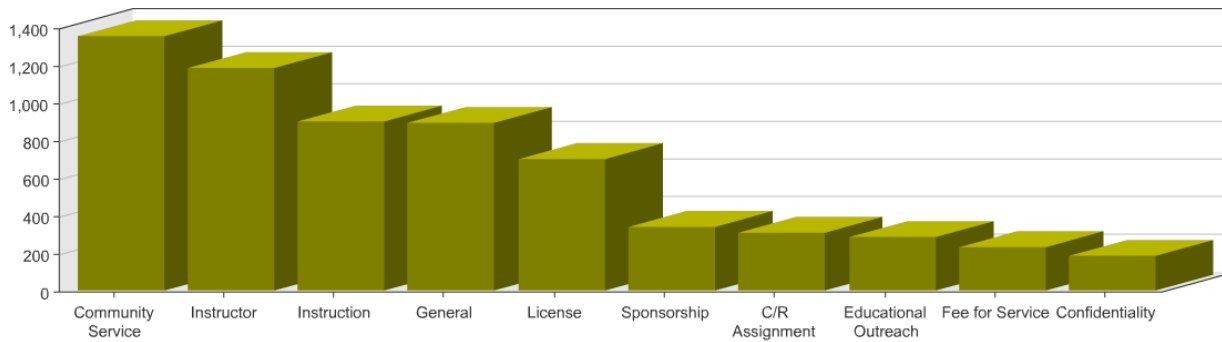
Logging In

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
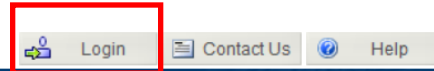
BCMS Dashboard

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"
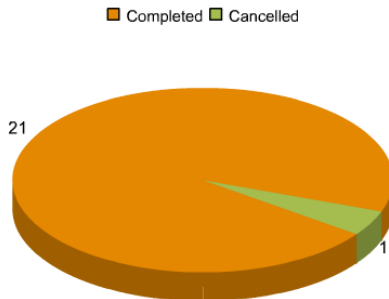
Create and Submit a New Project

1. To create a new project, click "Projects"

2. Once you've opened the Projects page, you'll see the options below
3. To submit a new project, click on "New Project"

4. Fill out the information under "General Info"
5. Required fields are in red – you will not be able to proceed to the next screen until all required fields are completed
6. Please remember that your due date should be an accurate reflection of staff availability and complexity of agreement – turnaround time will vary
7. In the "Project Description/Background" box, include as much information as possible
   a. Include similar BCMS agreements
   b. Include recent history and correspondence
   c. If this is an amendment, include the BCMS number of the original agreement

8. Next, select the services requested by checking the appropriate box in the "Services Requested of BCBP"
   a. Clarify the services you are requesting in the box below
9. In the "Risk/Liability/Concern" box, detail any contract risk or put "none known"
   a. In the next descriptive box, detail any reporting or applicable compliance requirements that need to be considered
   b. Check the box for government provisions if the contract includes any (e.g., FAR clauses)

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

Risk/Liability/Concerns
☑ This Contract has risk

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

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

☐ Does this Contract include government provisions?

10. Input the "Estimated Financial Impact" of the project along with any financial notes
    a. **Incoming funds**: University receiving money
    b. **Outgoing funds**: University paying money
    c. **Value of incoming/outgoing goods/services:** no-dollar agreement, but the goods/services involved have a value
11. Click "Save & Continue" before leaving this page – otherwise, your changes will not be saved

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. To add a new document, click "Add Document"
2. If your project is an amendment, upload the original agreement as well and reference it using the BCMS number

3. Complete all fields in red
4. 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.
5. Once you finish completing all fields, click "Upload Document"
6. Click on "Save Document" or your work won't be saved

Name	Type	Description	Copies To Mail	Update Date

Add Document   **Continue**

Document Name   [   ]

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

Document Description   [   ]

Upload Document

Document Note

B I S Iₓ | Styles ▾ Format ▾

Save Document

Add Points of Contact to a New Project

1. Click "Add UCB Contact" to add a UCB Contact (e.g., other people in the Department who need access to the Project)
2. Click "Add Non-UCB Contact" to add a Non-UCB Contact (e.g., the other party)

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3. 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"

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

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 Departmental Approval

1. The page will populate based on the information you previously provided in "General Info"
2. Select a Departmental Contract Coordinator from the "Route for review to selected Departmental Approver on Submit" list
3. To submit the request for Departmental approval, click "Submit Request"
   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"

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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 "Dept. Appr. Pending" once you've submitted it

E-mail Inbox

1. BCMS automatically generates e-mail notifications when the status of your new Project changes
2. You will receive an e-mail notification once your request has been submitted and approved by the Departmental Contract Coordinator and accepted for review by BCBP
3. 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