



BCMS Training Guide

for Department Contract Requesters
and Department Contract Preparers

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>.

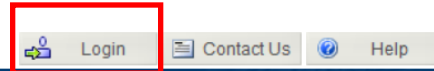
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Note: “Dashboards” shown within the Training Guide are examples only. Each user will view a unique dashboard upon log in.

Logging In

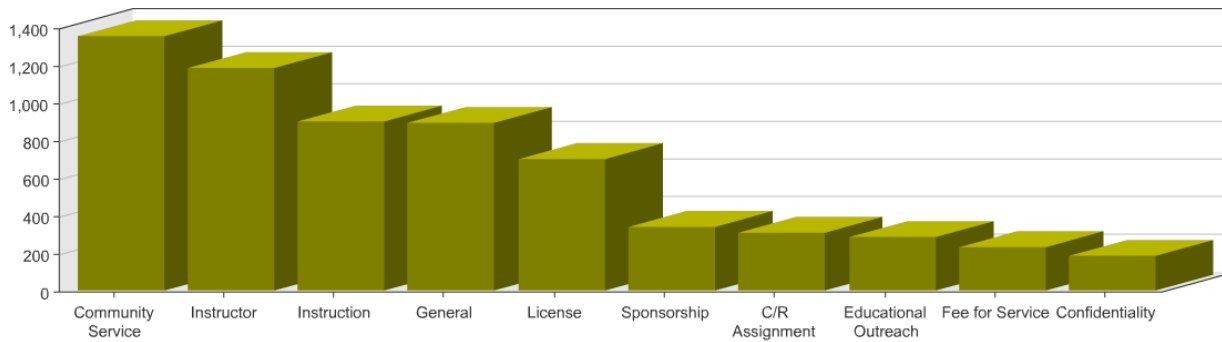
1. To get to the BCMS site, go to: <http://bcms.berkeley.edu/>. For additional information, go to: <http://bcbp.berkeley.edu/business-contracts/getting-started-bcms>.
2. Choose “Login” from the upper right hand corner and login using your CalNet ID and password



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 Contracts by Type



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"



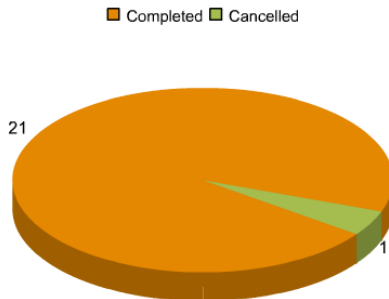
Welcome Emp-Staff-03, to the Business Contracts Management System (BCMS)

- 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](#).

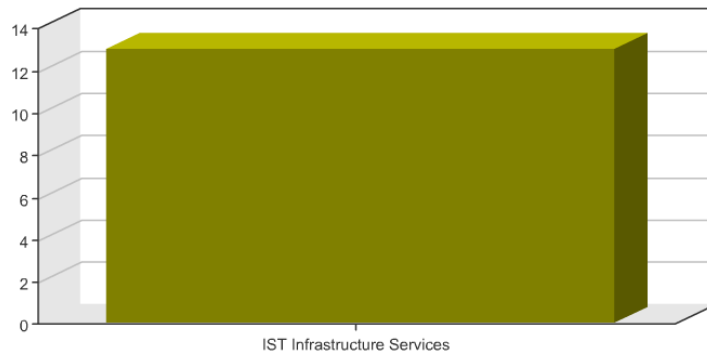
Attention Items

Info Services & Technology department

Department contracts by status



Department contracts by group



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”

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 mm/dd/yyyy - mm/dd/yyyy

Effective Date Range mm/dd/yyyy - mm/dd/yyyy

Expiration Date Range mm/dd/yyyy - mm/dd/yyyy

ID	Department	Other Party	Sub. Date	Eff. Date	Exp. Date	Status
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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

Home Logout Contact Us Help

Berkeley Business Contract Management System
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Tools Reports Settings Resources

New Project Request Form
Project ID: Status: Request - Not Saved [Back to Project Selection](#)

General Info

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

Contract Stage New

Project Name

Other Party Name

Contract Due Date mm/dd/yyyy


Project Description/Background

Input as much information as possible, including similar BCMS agreements, recent history and correspondence, etc. 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



[Empty text area]


Risk/Liability/Concerns
 This Contract has risk

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



[Empty text area]

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



[Empty text area]

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

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, quote, styles, and format. Below the toolbar is a large empty text area.

Project Note

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, quote, styles, and format. Below the toolbar is a large empty text area.

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

The screenshot shows the Berkeley Business Contract Management System interface. At the top, there are navigation links: Home, Logout, Contact Us, and Help. Below this is the Berkeley University of California logo and the system name. A secondary navigation bar includes Tools, Reports, Settings, and Resources. The main content area displays 'Project ID: 11752' and 'Status: Request -Saved, Not Submitted', with a 'Back to Project Selection' link. A horizontal menu contains 'Request Form', 'Docs' (highlighted with a red box), 'Contacts', 'Messages', and 'Status'. Below the menu is a text instruction: '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.' A table with columns 'Name', 'Type', 'Description', 'Copies To Mail', and 'Update Date' is shown, but it is empty. At the bottom of the table area, there are two buttons: 'Add Document' (highlighted with a red box) and 'Continue'. A footer bar at the bottom contains the text: 'Business Contracts & Brand Protection Office | Enterprise Application Services | UC Berkeley © 2014 UC Regents. All rights reserved.'

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. Note: 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 **Return Fully Executed Original to Dept.**

Document Description

Upload Document

Document Note

Rich text editor toolbar with icons for Cut, Copy, Paste, Undo, Redo, ABC, Link, Unlink, Flag, Image, Table, Bulleted List, Numbered List, Indent, Outdent, Quote, Styles, and 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)

The screenshot shows the Berkeley Business Contract Management System interface. At the top, there are navigation links: Home, Logout, Contact Us, and Help. Below this is the Berkeley University of California logo and the system title. A secondary navigation bar includes Tools, Reports, Settings, and Resources. The main content area displays 'Project ID: 11752' and 'Status: Request -Saved, Not Submitted', with a 'Back to Project Selection' link. A green navigation bar contains 'Request Form', 'Docs', 'Contacts' (highlighted with a red box), 'Messages', and 'Status'. Below this, a text instruction reads: '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.' A table with columns 'Name', 'Type', 'Phone', and 'Email' contains one entry: 'Test_Emp-Staff-03', 'UCB Requestor', '+1 510 643-1234', and 'test-322584@berkeley.edu'. At the bottom, there are four buttons: 'Add UCB Contact' (red box), 'Add Non-UCB Contact' (red box), 'Delete Contact', and 'Continue' (red box).

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

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

The screenshot displays the Berkeley Business Contract Management System interface. At the top, there is a navigation bar with 'User Emulation Mode Yes', 'Home', 'Logout', 'Contact Us', and 'Help'. Below this is the Berkeley logo and the system title 'Business Contract Management System'. A secondary navigation bar includes 'Tools', 'Reports', 'Settings', and 'Resources'. The main content area shows 'Project ID: 11752' and 'Status: Request -Saved, Not Submitted', with a link to 'Back to Project Selection'. A menu bar contains 'Request Form', 'Docs', 'Contacts', 'Messages', and 'Status'. A 'Campus Directory Search' dialog box is open, featuring 'First Name' and 'Last Name' input fields and a search icon. The background page includes an 'Add a new UCB Contact' section with a table containing one entry: 'Test,Emp-Staff-03'. A 'Continue' button is visible at the bottom right of the dialog box. The footer contains the text: 'Business Contracts & Brand Protection Office | Enterprise Application Services | UC Berkeley © 2014 UC Regents. All rights reserved'.

Post a Communication Regarding a Project

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

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

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

Project ID: 11752 Status: Request -Saved, Not Submitted

[Back to Project Selection](#)

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

- 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.				
Add Message				Continue

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

Add Message
Continue

Subject Importance Normal

Message

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Always respond to a message from the Message Board *via* the Message Board. Otherwise, your message will not become part of the historical record.

E-Mail To

Bouaricha, Meryam
 Davenport, Kristen
 Etheridge, Karen
 Goldblatt, Andrew
 Gonsalves, Janice
 Hazlett, Brett
 Hing, Janice
 Hong, Eryn
 Lee, Lloyd
 Lee, Sidney
 Litvak, Simon
 Ly, Carey
 Mount, Christopher
 Nguyen, Jimmy
 Rubinshteyn, Maria
 Test, Emp-Staff-03
 Test, Emp-Staff-04
 Test, Emp-Staff-05
 Tran, Andrew
 Zhu, Ling

Post 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”

The screenshot displays 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 title "Business Contract Management System". A secondary navigation bar includes Tools, Reports, Settings, and Resources. The main content area shows the "Project ID: 11752" and "Status: Request -Saved, Not Submitted". A "Back to Project Selection" link is available. The "Request Form" tab is active, and the "Status" tab is highlighted. The "General Info" section includes fields for "Requesting Dept." (Info Services & Technology), "Group" (IST Infrastructure Services), "Kind" (BCBP Contract), "Contract Due Date" (09/22/2015), "Stage" (New), "Project Name" (test), and "Other Party Name" (test). Below this, it states "Saved, not Submitted by" and lists "Name" (Emp-Staff-03 Test), "Email" (test-322584@berkeley.edu), "Phone" (+1 510 643-1234), and "Date" (09/22/2015). The "Route for review to selected Departmental Approver on Submit" section shows a radio button selected for "Test, Emp-Staff-05". A "Note" section with a rich text editor is present. At the bottom right, there are "Submit Request" and "Cancel Request" buttons. The footer contains the text "Business Contracts & Brand Protection Office | Enterprise Application Services | UC Berkeley © 2014 UC Regents. All rights reserved".

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

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

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

Projects

Project ID Info Services & Technology

Project Name

Other Party

Descr/Note

Status

Specialist Active Only

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 -Dept. Appr. Pending


● Requested action successfully completed

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