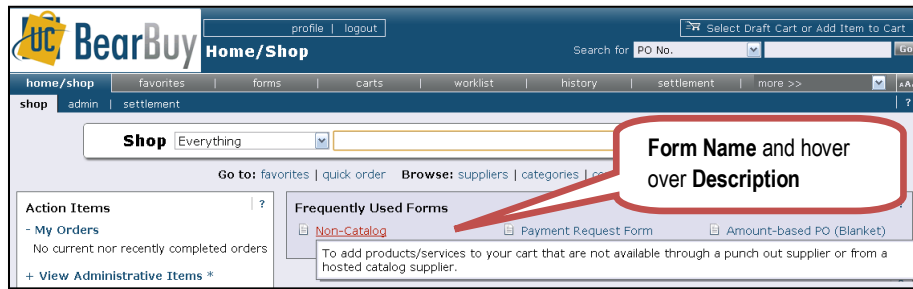


Shop Using BearBuy Forms

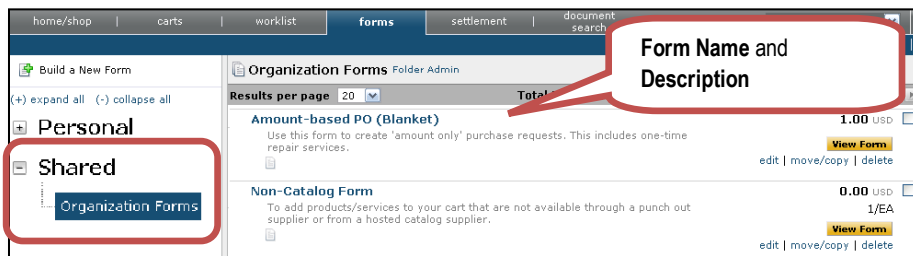
- ▶ This guide demonstrates how to use Forms to request items or services not found in hosted or punch-out catalogs.
- ▶ Use Forms to create Carts for non-catalog goods, services and several other pre-configured business forms.
- ▶ When selected, Forms are presented in a “pop-up” window. Complete the required information and the product or service is returned as a line item to your Cart. The form item will travel with your Cart, allowing convenient review by Requisition Creator and Approvers.

Access Forms

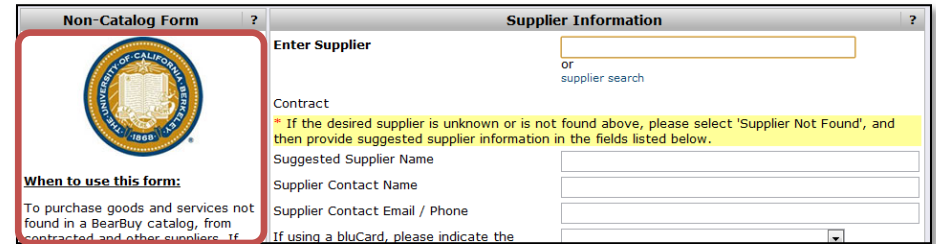
- From the **Frequently Used Forms** section, select the appropriate **form**.
 - A simple description of the form will be shown if you hover over the form name.
 - Click the form name to open the form (*skip to #3*).



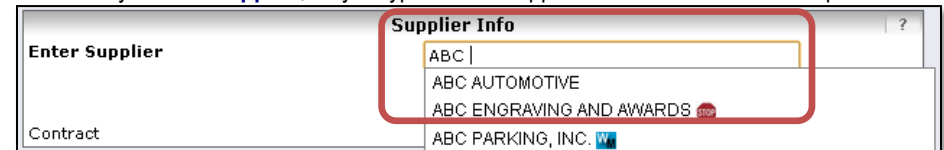
- You can also access Forms from the **navigation bar > forms**.
 - On the **Forms** page, click **Shared** to expand to show **Organization Forms**.
 - The list of forms is shown on the right side of the page.
 - Browse the list of forms (descriptions are shown). Click the **View Form** button.



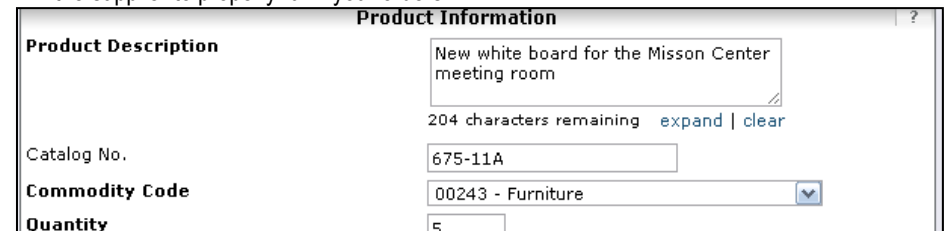
- The **form** will open in a new window.
 - Since each form has been tailored for requesting specific items, services or request types, unique instructions are shown on the left-hand side of every form.



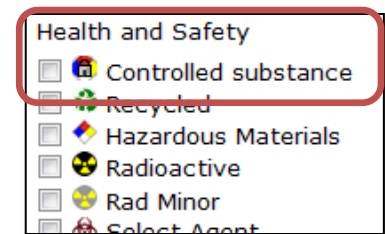
- Enter** all required information (indicated in bold on the form).
- When you enter **supplier**, as you type a list of suppliers will be shown in the drop down.



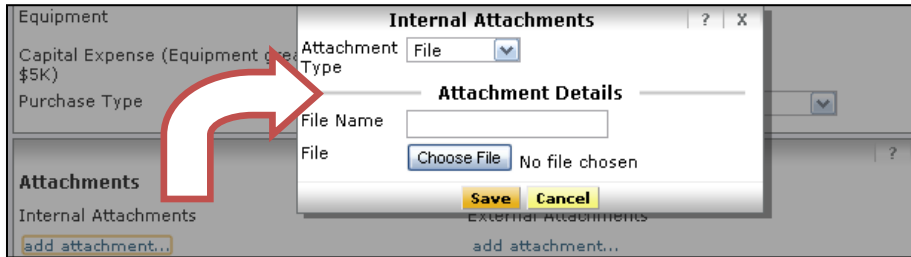
- On some forms (such as the *Non-Catalog Form*), you have the opportunity to add detailed item information such as **description**, **catalog no**, and **manufacturer name**.
 - ▶ While not always required, adding such information is a preferred practice and will help the supplier to properly fulfill your orders.



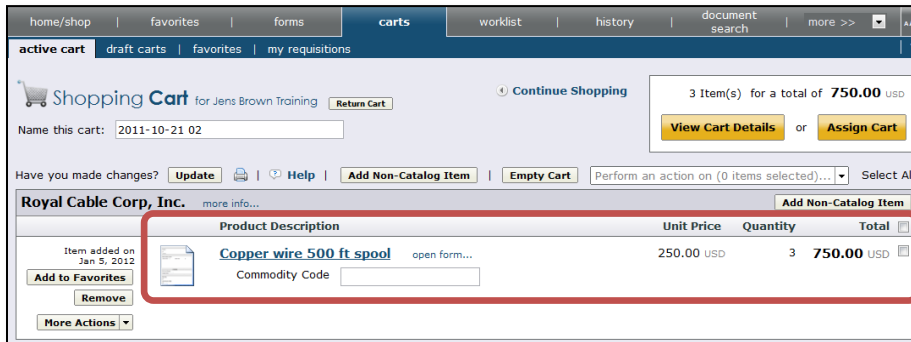
- On Some forms, (such as the *Non-Catalog Form*) you can flag the item as a Controlled Substance, Hazardous Material or Radioactive– when known, always select the appropriate flag.
 - ▶ Most of these ‘flags’ will result in the proper individuals being added to the Requisition workflow later on in the process.



- Click the **add attachments** link to attach **Internal** or **External Attachments** (if applicable).

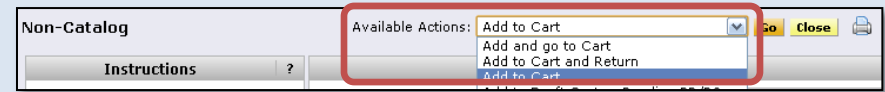


- When the form is complete, scroll to the top of the form and from the **Available Actions** (Click here for details): menu, select **Add and go to Cart**. (If you don't select **Add and go to Cart**, you will need to click **Go** then click **Close** button to add the form to the Cart).
- Click the **Go** button to return to the shopping cart. The **Form** item is added to the Requisition.



- The Shopping Cart can now be assigned to the Requisition Creator.
- To edit the form, click the **Product Description** or the **Form Picture**.
- The **Form** will open.
- Make any necessary changes and when complete, scroll to the top of the form and from the **Available Actions** (Click here for details): menu, select **Save**.
- Click the **Go** button to return to the shopping cart.

About the 'Available Actions' on the Form



The **Available Actions** menu (located at the top of page), provides additional features for working with forms:

- ▶ **Add and go to Cart:** Select to add the form to your current shopping cart. You will be returned to BearBuy cart.
- ▶ **Add to Cart and Return:** Select to add the form line item to your current shopping cart. The form page displays with the previously selected vendor and all other fields are reset to blank.
- ▶ **Add to Cart:** Select to add the form to your current shopping cart. The form page displays unchanged. This option eliminates redundant data entry by using the existing form data as a template.
- ▶ **Add to Draft Cart or Pending PR/PO:** Typically used by Requisition Creator and Buyer, this allows you to add the form to a draft cart or pending requisition.
- ▶ **Add to Favorites:** Select to add the form as a favorite. A pop-up window displays where you can select the personal folder and name of the form.

List of Forms in BearBuy

Form Name	Proper Usage	Requires Org Node Approval?	Practices and / or Policy Apply?
After the Fact	To pay for goods/services for which a purchase order has not previously been completed.	Yes	Yes – see form
Non-Catalog	To request goods not found in a BearBuy catalog from contracted and other suppliers.	No	Will depend on type of purchase
Temporary Staffing Request	To request temporary staffing from our strategically sourced contracts, for the following categories: Admin/Clerical, Food Services, IT Services, Light Industrial, or Trade.	No	Yes – see form
Vehicle Charter Request	To purchase vehicle charter services with strategically sourced suppliers.	No	Yes – see form
Off Campus Events	To reserve off-campus rental space for your department's event when meals or guest rooms are included. If your event only involves the use of space, call Real Estate Services at (510) 642-9942 at least 15 business days before the event and ask them to execute a contract with the host facility.	No	Yes – see form
Moving Services: Household and Personal Effects	To request moves for new campus hires. The relocation move can involve the move of the new hire's household, office, and/or laboratory.	Yes	Yes – see form
Service Order	To request 'amount only' purchase requests for services.	Yes	Will depend on type of purchase
Independent Contractor and Consultant Services	To request personal/ professional/ independent contractor or consulting services.	Yes	Yes – see form
Sole Source	To create a purchase order where the dollar amount exceeds \$10,000 when using non-federal funds or \$5,000 when using federal funds, and competitive bidding is unavailable.	No	Yes – see form
Payment Request	To use for activities not requiring a Purchase Order are processed as a Payment Request. Each activity has different documentation requirements which must be attached to the Payment Request Form.	Yes	Yes – see form
Subaward	There are two types of Subaward form, one for UC and one for Non UC. These are used for all subawards.	Yes	Yes – see form