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

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

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

3. The form will open in a new window.
   a. 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.

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

6. 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.

7. 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.
8. Click the add attachments link to attach Internal or External Attachments (if applicable).

9. 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).

10. Click the Go button to return to the shopping cart. The Form item is added to the Requisition.

11. The Shopping Cart can now be assigned to the Requisition Creator.

12. To edit the form, click the Product Description or the Form Picture .

13. The Form will open.

14. 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.

15. 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

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Proper Usage</th>
<th>Requires Org Node Approval?</th>
<th>Practices and / or Policy Apply?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>After the Fact</strong></td>
<td>To pay for goods/services for which a purchase order has not previously been completed.</td>
<td>Yes</td>
<td>Yes – see form</td>
</tr>
<tr>
<td><strong>Non-Catalog</strong></td>
<td>To request goods not found in a BearBuy catalog from contracted and other suppliers.</td>
<td>No</td>
<td>Will depend on type of purchase</td>
</tr>
<tr>
<td><strong>Temporary Staffing Request</strong></td>
<td>To request temporary staffing from our strategically sourced contracts, for the following categories: Admin/Clerical, Food Services, IT Services, Light Industrial, or Trade.</td>
<td>No</td>
<td>Yes – see form</td>
</tr>
<tr>
<td><strong>Vehicle Charter Request</strong></td>
<td>To purchase vehicle charter services with strategically sourced suppliers.</td>
<td>No</td>
<td>Yes – see form</td>
</tr>
<tr>
<td><strong>Off Campus Events</strong></td>
<td>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.</td>
<td>No</td>
<td>Yes – see form</td>
</tr>
<tr>
<td><strong>Moving Services: Household and Personal Effects</strong></td>
<td>To request moves for new campus hires. The relocation move can involve the move of the new hire’s household, office, and/or laboratory.</td>
<td>Yes</td>
<td>Yes – see form</td>
</tr>
<tr>
<td><strong>Service Order</strong></td>
<td>To request ‘amount only’ purchase requests for services.</td>
<td>Yes</td>
<td>Will depend on type of purchase</td>
</tr>
<tr>
<td><strong>Independent Contractor and Consultant Services</strong></td>
<td>To request personal/ professional/ independent contractor or consulting services.</td>
<td>Yes</td>
<td>Yes – see form</td>
</tr>
<tr>
<td><strong>Sole Source</strong></td>
<td>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.</td>
<td>No</td>
<td>Yes – see form</td>
</tr>
<tr>
<td><strong>Payment Request</strong></td>
<td>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.</td>
<td>Yes</td>
<td>Yes – see form</td>
</tr>
<tr>
<td><strong>Subaward</strong></td>
<td>There are two types of Subaward form, one for UC and one for Non UC. These are used for all subawards.</td>
<td>Yes</td>
<td>Yes – see form</td>
</tr>
</tbody>
</table>