20/30 Webinar Series:
#5 Non-Catalog Form and its Many Uses!
Agenda

1. About this Session
2. About the Non-Catalog Form
   • Overview
   • Types of Transactions
   • Layout
   • Workflow
3. Resources & Support
4. Question and Answer
About this Session

• All users
• 30 Minutes
• About the Non-Catalog Form
• Question and Answer
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About the Non-Catalog Form
Overview

The non-catalog form is designed to be used when you need to purchase goods not found in a BearBuy catalog.

If only purchasing services use the Service Request form.

Material Management Policy (BUS 43):
http://policy.ucop.edu/doc/3220485/BFB-BUS-43
Non-Catalog Form vs Non-Catalog link

Although both the non-catalog form and the non-catalog item perform in the same manner, the non-catalog item has limitations:

- Cannot enter suggested supplier information
- Cannot attach any supporting documents
- Cannot enter any bluCard tracking information
Transaction Types

Should only be used for:

• Tangible Goods not found in other BearBuy catalogs:
  • Office Supplies
  • Lab material
  • Copies
  • Other

• Contract associated goods
  • When needing to purchase goods not found on the BearBuy catalogs but are associated to a contract in BearBuy.

• bluCard tracking
  • When requesting an item to be paid on a bluCard
  • Optional – tracking a previous paid item
Contract Associated Goods

When you need to purchase goods associated to an existing contract in BearBuy.

- Once you select the supplier/vendor you can then associate the contract to the form
- By selecting the associated contract, the Buyer workflow triggers change
- Creates opportunity to track on contract spend!
  - Helps campus negotiate better contracts
  - Helps campus capture actual spend data
bluCard Tracking

Requires separate payment via bluCard.

• Supplier will always be “bluCard Tracking”
  • Enter desired vendor within the suggested supplier field.

• Orders created using this process will not dispatch to the vendor or to BFS

• When the requisition is fully approved the bluCard holder will place the order directly with the supplier.

• Items paid via bluCard will appear on a separate bluCard order and in the PO History with an order number similar to the format “CC12345678” The order number can be referenced in the transaction notes in BFS during reconciliation.
  • bluCard transaction reconciliation in BFS remains the same.

• Associated Policy BUS-43 Section 6: http://policy.ucop.edu/doc/3220485/BFB-BUS-43
Form Layout

Left Navigation Section
- Important information will be included in the left navigation bar of all of the forms with sections on:
  - When to Use the Form
  - Form Instructions
  - Policy Guidelines

Completing the Form
- You **must complete** all of the sections with **bolded** headers
- Click on the Question Mark icon in the upper right hand corner of each section of the form. It provides you with information to correctly complete the form.
- Include documents as needed in the Internal and External Attachment sections.
  - Include as internal attachments, documents as required by the Unit and University policy for the purchase
  - Include as external attachments only those documents that need to be sent to the supplier
Workflow/Routing

Basic triggers
- If subtotal is >$1,000 – Routes to Requisition Approver
- If subtotal is >$5,000 – also routes to Campus Buyer

Health & Safety Flags/Triggers
Helps correctly trigger & route specialty approvals. Must be manually selected
- Controlled Substances
- Toxic Gases
- Hazardous Material
- Radioactive Material
- For more information on EH&S programs and program requirements visit the EH&S website (http://ehs.berkeley.edu/)

Contracts and triggers
If a contract is associated to a non-catalog form, the routing triggers change
- If subtotal is >$1,000 – Routes to Requisition Approver
- If subtotal is >$100,000 – Also routes to Campus Buyer
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RESOURCES & SUPPORT
Training Resources

• The BearBuy website is the source for the most up to date news, announcements and training resources
  – procurement.berkeley.edu/bearbuy

• BearBuy YouTube Channel
  – youtube.com/user/BearBuyProcurement

• Need more assistance? Contact the BearBuy help desk!
  – (510) 664-9000 Option 1, Option 2, Option 1
  – Mon-Fri 8 AM to 5PM
  – Email BearBuy Help (bearbuyhelp@berkeley.edu)
Thanks For Watching!