



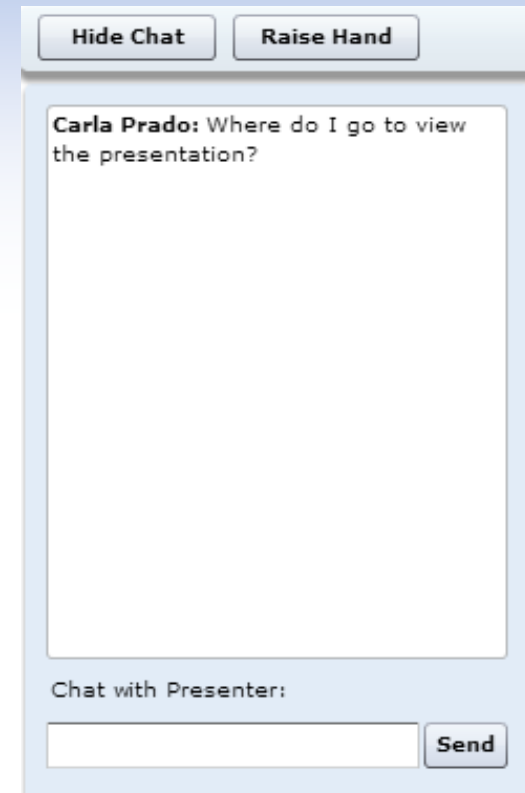
University of California
Berkeley



**20/30 Webinar Series:
#5 Non-Catalog Form and It's Many Uses!**

Communication

- Use the **Chat** area in ReadyTalk for clarification, questions, or feedback. Let us know what you think!
- To access this presentation or listen to the recording, visit the
 - BearBuy YouTube Channel:
 - <http://www.youtube.com/user/BearBuyProcurement>



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Carla Prado: Where do I go to view the presentation?

Chat with Presenter:

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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

About the Non-Catalog Form

15
min

Q&A

15
min

20-30 Webinar Series

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.

It's the primary method for purchasing items that are not feasibly purchased through BearBuy.

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

Non-Catalog Form

Available Actions: Add and go to Cart

Non-Catalog Form ?

Supplier Information ?

Enter Supplier

or
[supplier search](#)

Contract:

*** If the desired supplier is unknown or is not found above, please select 'Supplier Not Found', and then provide suggested supplier information in the fields listed below.**

Suggested Supplier Name

Supplier Contact Name

Supplier Contact Email / Phone

If using a bluCard, please indicate the following:

General Info ?

Expense Information Catalog No. Quantity Estimated Unit Price

254 characters remaining [expand](#) | [clear](#)

Manufacturer Name Manufacturer Model Number Fabrication Number

Health and Safety

☐ Controlled substance

☐ Recycled

☐ Hazardous Materials

☐ Radioactive

☐ EH&S Review (Toxic, Hazardous)

When to use this form:

To purchase combined goods & services not found in a BearBuy catalog. If only purchasing services use the Service Request form.

You may use this form to track purchases that will be made separately with a bluCard. A bluCard should be used for paying registration fees, one-time vendors, vendors not accepting PO's, etc. It's the primary method for purchasing items that are not feasibly purchased through BearBuy.

Form Instructions:

Complete all fields whenever possible.

If purchasing items that require you to select the Hazardous Materials check box include the RUA and EH&S numbers in the ITEM DESCRIPTION box under the GENERAL INFO section.

BluCard Tracking:
Orders created using this process, requiring

Non-Catalog Item ?

Enter Supplier

or
[supplier search](#)

Expense Information Catalog No. Quantity Price Estimate Packaging

254 characters remaining [expand](#) | [clear](#)

☐ **Product Details**

Commodity Code

Manufacturer Name

Manufacturer Model Number

☐ Controlled substance

☐ Recycled

☐ Hazardous Materials

☐ Radioactive

☐ EH&S Review (Toxic, Hazardous)

☐ Select Agent

☐ Toxin

☐ Energy Star

☐ Green

Transaction Types

Should only be used for, anything else should be placed on another form:

- 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

Non-Catalog Form Available Actions: Add and go to Cart Go Close

Non-Catalog Form ?



When to use this form:

To purchase combined goods & services not found in a BearBuy catalog. If only purchasing services use the Service Request form.

You may use this form to track purchases that will be made separately with a bluCard. A bluCard should be used for paying registration fees, one-time vendors, vendors not accepting PO's, etc. It's the primary method for purchasing items that are not feasibly purchased through BearBuy.

Form Instructions:

Complete all fields whenever possible.

If purchasing items that require you to select the Hazardous Materials check box include the RUA and EH&S numbers in the ITEM DESCRIPTION box under the GENERAL INFO section.

BluCard Tracking:

Orders created using this process, requiring separate payment via bluCard, will not dispatch to the vendor or to BFS. Only the req creator can change the supplier on the requisition to BLUCARD TRACKING.

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 "CC1234567890." The order number can be referenced in the transaction notes in BFS during reconciliation. bluCard transaction reconciliation in BFS remains the same.

Policy/ Guidelines:

Bus 43 Materiel Mgmt

Supplier Information ?

Enter Supplier

or
supplier search

Contract:

• If the desired supplier is unknown or is not found above, please select 'Supplier Not Found', and then provide suggested supplier information in the fields listed below.

Suggested Supplier Name

Supplier Contact Name

Supplier Contact Email / Phone

If using a bluCard, please indicate the following:

General Info ?

Item Description	Catalog No.	Quantity	Estimated Unit Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
254 characters remaining expand clear			

Manufacturer Name	Manufacturer Model Number	Fabrication Number	Health and Safety
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Controlled substance <input type="checkbox"/> Recycled <input type="checkbox"/> Hazardous Materials <input type="checkbox"/> Radioactive <input type="checkbox"/> EH&S Review (Toxic, Hazardous) <input type="checkbox"/> Select Agent <input type="checkbox"/> Toxin <input type="checkbox"/> Energy Star <input type="checkbox"/> Green

General Info Total: 0.00

Attachments ?

Privacy Warning: Do not upload any document in BearBuy, or any other website application, unless the notice triggering data and the home & family data is blacked out and **completely unreadable**. The best approach is to remove this data from the document before uploading it. [Data Privacy]

Internal Attachments	External Attachments
Internal Attachments [Privacy Warning] add attachment...	External Attachments [Privacy Warning] add attachment...

Total 0.00

Workflow/Routing

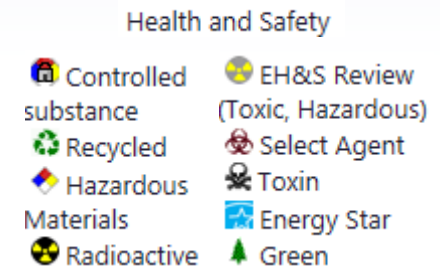
Basic triggers

- 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

[Navigating to Form in BearBuy]

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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](mailto:bearbuyhelp@berkeley.edu) (bearbuyhelp@berkeley.edu)



Questions and Answers!

