20/30 Webinar Series: #15
Forms 101
Agenda

1. About this Session
2. About Forms
3. Resources & Support
4. Question and Answer
About this Session

• All users
• 30 Minutes
• About Forms
• Question and Answer

About Forms

Q&A

15 min

15 min
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About Forms
Why do we use forms in BearBuy?

• We use forms to order goods and services not found in the hosted or punch-out catalogs

• Forms also facilitate certain approval workflow or the flow of required documents

• Forms are used to designate the type of Purchase Order liquidation (either Amount or Quantity)

• The After-the-Fact and Payment Request forms auto-flip vouchers when the POs are created
Amount vs. Quantity Based

• You can add multiple vendors in a cart as long as the forms you are using for each vendor all are the same type (amount or quantity).

• Please note that Catalog purchases can only be combined with other Catalog purchases (no mixing forms with catalog purchases).

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form Type</th>
<th>Request by Amount</th>
<th>Request by Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Only Form</td>
<td>Amount</td>
<td>OK</td>
<td>NO</td>
</tr>
<tr>
<td>Independent Contractor and Consultant Services Form</td>
<td>Amount</td>
<td>OK</td>
<td>NO</td>
</tr>
<tr>
<td>Moving Services: Household and Personal Effects Form</td>
<td>Amount</td>
<td>OK</td>
<td>NO</td>
</tr>
<tr>
<td>Non-Catalog Form</td>
<td>Quantity</td>
<td>NO</td>
<td>OK</td>
</tr>
<tr>
<td>Non-Catalog Item</td>
<td>Quantity</td>
<td>NO</td>
<td>OK</td>
</tr>
<tr>
<td>Off-Campus Events Form</td>
<td>Amount</td>
<td>OK</td>
<td>NO</td>
</tr>
<tr>
<td>Payment Request Form</td>
<td>Quantity</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Service Order Request</td>
<td>Amount</td>
<td>OK</td>
<td>NO</td>
</tr>
<tr>
<td>Sole Source Over $100,000 Form</td>
<td>Amount</td>
<td>OK</td>
<td>NO</td>
</tr>
<tr>
<td>Subaward Forms</td>
<td>Amount</td>
<td>OK</td>
<td>NO</td>
</tr>
<tr>
<td>Temporary Staffing Request Form</td>
<td>Quantity</td>
<td>NO</td>
<td>OK</td>
</tr>
<tr>
<td>Vehicle Charter Request Form</td>
<td>Quantity</td>
<td>NO</td>
<td>OK</td>
</tr>
<tr>
<td>After the Fact Form</td>
<td>Quantity</td>
<td>NO</td>
<td>NO</td>
</tr>
</tbody>
</table>

• Note:
  – 1 form = 1 form type
  – A user can create a cart with multiple suppliers as long as the form type's (by amount or by quantity) are identical.
Forms Specific To Suppliers

The Five supplier specific forms:

- Claremont Off Campus Event Form
- Moving Services: Household and Personal Effects
- Subaward – UC Recipient
- Temporary Staffing Request
- Vehicle Charter Request

- Forms have a specific Supplier or a drop down list of suppliers.
- Forms are driven either by nature of business with the supplier (i.e. Claremont Off Campus Event Form) or
- Are strategically sourced suppliers for the type of expenditure needed (i.e. Moving Services, Temporary Staffing, etc)

If a department needs to purchase services listed above from a supplier not listed on the form, a transaction based form can be used.
Transaction Based Forms

The nine transaction based forms include:

• After the Fact PO
• Amount Only
• Independent Contractor and Consultant Services
• Non-Catalog Form
• Off Campus Events
• Payment Request Form
• Service Order Request
• Sole Source Over $100,000
• Subaward – Non UC Recipient

• Any supplier in BearBuy can be used on any of these forms
• Forms are designed by the type of transaction
• Some forms are designed to follow specific approval workflow
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RESOURCES & SUPPORT
Resources & Support

• Job aids available for:
  – blucard Tracking, Forms Matrix, Glossary of Terms, Payment Request form, Claremont Off Campus Event Form, and Sole Source Form.
  – http://supplychain.berkeley.edu/bearbuy/instructional-resources-0

• BearBuy YouTube Channel - Short demos videos!
  – youtube.com/user/BearBuyProcurement
  – Subscribe to receive notifications when new videos are posted.

• BearBuy Help Desk #1 place to stop for help:
  • (510) 664-9000 Option 1, Option 2
  • Mon-Fri 8 AM to 5PM
  • Email BearBuy Help (bearbuyhelp@berkeley.edu)

• Follow us on Instagram!
  – Another source of receiving news about upcoming events
  – http://instagram.com/ucb_bearbuy?ref=badge
Questions?

Please send all related question to bearbuyhelp@berkeley.edu