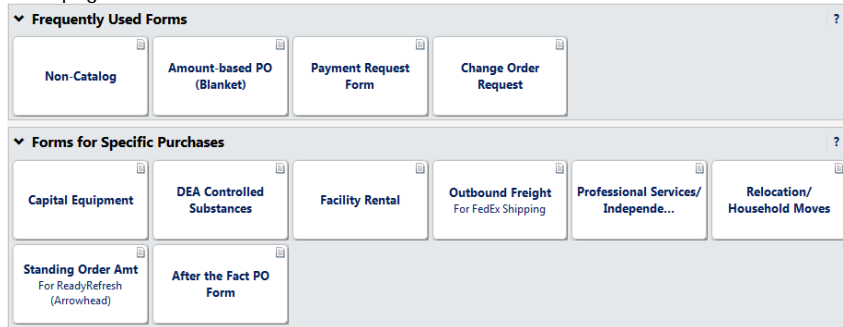


Shop Using BearBuy Forms

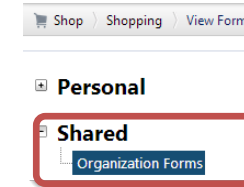
- ▶ This guide demonstrates using forms to request items or services not found in hosted or Punch-out catalogs.
- ▶ Use forms to create carts for non-catalog goods, services, purchases requiring special processing, and restricted items.
- ▶ Some forms (such as the *Change Order Request* Form) are used to route requests within UCSF and may not result in a PO once the requisition is created from the form.
- ▶ When selected, forms are presented in a "pop-up" window. Complete the required information and add the form to your cart. The product or service then becomes a line item to your cart. The form item will travel with your cart, allowing convenient review by Requesters and Approvers.
- ▶ A list of BearBuy Forms is on page 5.

Access Forms

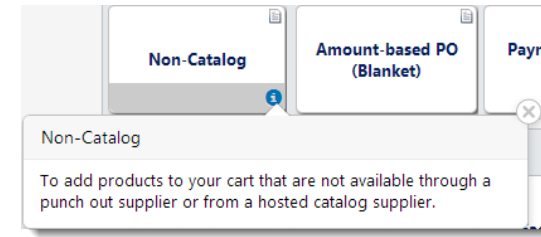
1. All Forms are available on the Shopping Homepage. If you are not on the Shopping homepage, use the left navigation menu **Shop** > **Shopping** > **Go To** > **Shopping Home** to access the homepage.
 - a. Forms are grouped by categories on the homepage. Most forms are available in the **Frequently Used Forms** or **Forms for Specific Purchases** section on the homepage.



- b. Forms are identified on the Shopping Homepage by a form symbol in the upper right above the form name.
2. A listing of forms are also available at **Shop** > **Shopping** > **Go To** > **View Forms**.
 - a. If a listing of forms does not appear, click **Shared** to expand the menu and then click on the **Organization Forms** link.



- b. The list of forms displays on the right side of the page.
3. Review all available forms.
 - a. To obtain more detail on what a form is used for, hover over the name of the form until the icon appears. Click on the icon and a description of the form will appear.



Choosing Forms

1. Evaluate if a form is appropriate for your purchase.
 - a. If there is a form for your specific type of purchase or request, use the form.
 - b. Otherwise, determine if the Non-Catalog Form or Amount-based PO Form is appropriate for your purchase.
2. Click on the form name to open the form.
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. Be sure to fully read all instructions on the form.
 - b. Many forms also have **How to Buy guides** linked on each form to provide detailed instructions on the appropriate use of the form and guidance on purchase requirements.

Completing Forms

1. **Enter** all required information (indicated in bold on the form).
 - a. If you are uncertain what to enter in a form field, "help text" is often available to provide additional guidance by clicking on a **field name** or the "?" in the upper corner of each form section. "Help text" is available on many forms.
 - b. Always provide complete information for your purchase.
2. Begin by typing a supplier name in the **Enter Supplier** field. A list of suppliers matching your entry appears in the dropdown as you type.
 - a. If the desired supplier does not appear, request the setup of a new vendor using the online new vendor setup form on the Accounts Payable website: http://supplychain.ucsf.edu/sites/supplychain.ucsf.edu/files/wysiwyg/W9-SIF-ACH-15_10.pdf.

3. 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**.
 - a. While not always required, adding such information is a best practice and will help the supplier to properly fulfill your orders.

4. On some forms, (such as the *Non-Catalog Form*) you can select flags, such as Radioactive, to flag the item. When known, always select the appropriate flag.

Health and Safety Radioactive

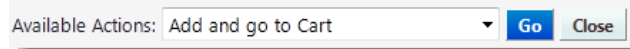
5. Click the **Add Attachments** button to attach **Internal** or **External Attachments** (if applicable).
 - a. Always provide any necessary or required supporting documentation for your purchase.
 - b. Click the **Select files...** button to upload one or more files.
 - i. Alternatively, you can also drag files from your computer to the gray space next to the **Select Files...** button to upload one or more files.
 - ii. **NOTE:** uploading multiple files or dragging files to upload is not supported in Internet Explorer 8 or 9 and older versions of Firefox ERS.
 - c. Wait for all the files to be uploaded. The number next to the file name shows what percentage of the file is uploaded. 100% means the file is completely uploaded. The gray area next to the **Select Files...** button will show the text **Done** when the upload is complete.
 - d. Optionally rename the file names by typing over them in the text box.
 - e. Click the **Save Changes** button to save the fully uploaded attachments.

- f. If you need to move an uploaded file between an internal and external attachment section of a form, use the dropdown menu next to the file's corresponding **Remove** link.

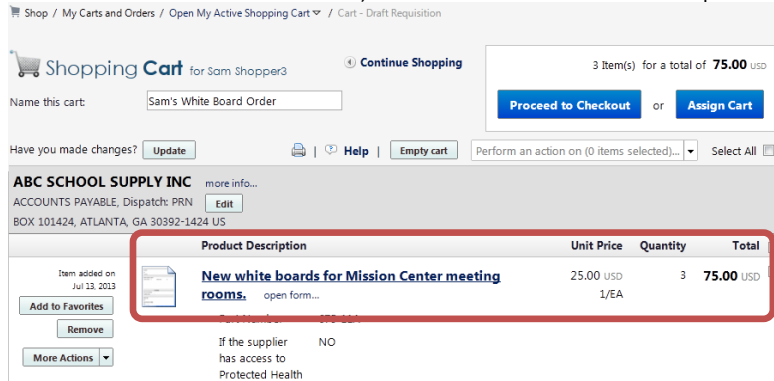
- g. Click on the **Move to Internal (or External) Attachments** option in the menu.



- h. If you need to remove an attachment, click the **Remove** link next to the attachment.
6. When the form is complete, scroll to the top of the form and from the **Available Actions** menu, select **Add and go to Cart**. You can also select another applicable option from the dropdown menu.



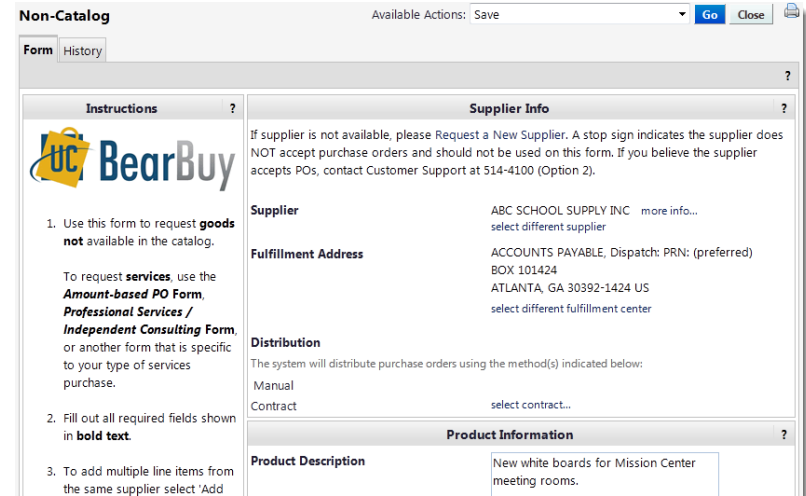
7. Click the **Go** button to add the form to the shopping cart. (Note: some options in the Available Actions dropdown will not automatically close the form window or direct you to the cart, such as the Add to Cart option. If you are done with the form, you will need to click the **Close** button to exit the form.) The **Form** item is added to the requisition.



8. At this point, the Shopper/Requester can **Proceed to Checkout** or **Assign** the cart to a Shopper/Requester. (During checkout, once the cart is complete, the Shopper can again assign the cart. At that time, a Requester can place the order directly.)

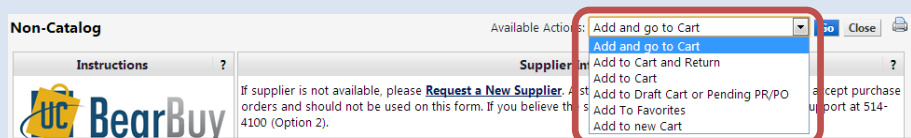
Editing Forms before Assigning Cart/Placing Order

- To edit the form after adding it to the cart, click the **Product Description** or the **open form...** link in the cart.
- The **Form** will open.



- Make any necessary changes and when complete, scroll to the top of the form and from the **Available Actions** menu, select **Save**, then **Go**.
- Click the **Close** 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. The form will close, and you will be sent to the BearBuy shopping cart page.
- ▶ **Add to Cart and Return:** Select to add the form to your current shopping cart. The form stays open, retaining the selected supplier. All other form fields are cleared, allowing you to fill out the form for another item from the same supplier. This option makes it easy to add multiple items from one supplier to one cart.
- ▶ **Add to Cart:** Select to add the form to your current shopping cart. The form page displays unchanged and retains all data previously entered in the form. 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 Requesters. This allows you to add the form to a draft cart.
- ▶ **Add to Favorites:** Select to add the form as a favorite. A pop-up window displays where you can name the favorite and select the folder to store the form.
- ▶ **Add to new Cart:** Selecting this option creates a new active cart and adds the form to this cart. Your previous active cart (if any) will be saved as a draft cart located at [Shop](#) → [My Carts and Orders](#) → [View Draft Shopping Carts](#)

Additional Forms Guidance

- ▶ For additional guidance on determining which form to use, the Common Transactions & Purchasing Methods List located at: http://supplychain.ucsf.edu/sites/supplychain.ucsf.edu/files/wysiwyg/Transaction_and_Purchasing_Methods.xls specifies the appropriate way to purchase common transactions, including using forms.
- ▶ How to Buy guides located at: <http://supplychain.ucsf.edu/how-buy-instructions> are also available for review.
- ▶ Review a full listing of forms and their descriptions in the next page.

Available BearBuy Forms

Form Name	Proper Usage	Commodity Code and Account
 After the Fact Form	▶ To pay for goods/services where a purchase order was not previously created for the purchase, which is considered an unauthorized purchase per UC policy.	▶ Commodity Code and Account are specified by the person preparing the form.
 Amount-Based PO	▶ Use this form to create 'amount only' purchase requests for common services and goods. It can also be used to create blanket orders for recurring services. Examples include one-time repairs or sequencing services.	▶ Commodity Code and Account are specified by the person preparing the form.
 Capital Equipment	▶ Use this form for equipment or capitalized software over \$5000.	▶ Default Commodity Code of '00330 - Equip Inventorial'. This will set a default Account of '52603'. ▶ If you have sponsored project funding sources, please use the following Accounts: <ul style="list-style-type: none"> ○ 51321 - Sponsored proj equip >\$5K, non-comp ○ 51322 - Sponsored proj computer >\$5K ○ 51323 - Sponsored proj software >\$5K
 Change Order Request	▶ Use this form to request a change to a Purchase Order that has already been sent to the supplier.	▶ Commodity Code not applicable.
 DEA Controlled Substances	▶ Use this form to request drugs considered Controlled Substances by the Drug Enforcement Agency (DEA).	▶ This form will default a commodity code of '00278 - Drugs/Pharmaceuticals.' This will make the Account default to '52104'.
 Facility Rental	▶ Use this form to request an off-site non-UC facility rental for all overnight events requiring a signed contract.	▶ Default Commodity Code of '00307 - Facility Rental/Food'. This will set a default Account of '57200'.
 Meeting & Entertainment Payment Request Form	▶ Use this form for requesting payment for event related expenses where the supplier does not require a contract.	▶ Commodity Code not applicable.
 Non-Catalog	▶ Use this form to request goods that are not available through a hosted or Punch-out catalog.	▶ Commodity Code and Account are specified by the person preparing the form.
 Outbound Freight (for FedEx Shipping)	▶ Use this form to create blanket POs for FedEx shipments sent out from UCSF.	▶ Commodity Code and Account are specified by the person preparing the form.
 Payment Request	▶ Use this form to request payment on a Non-BearBuy PO invoice or when an invoice is not available. Do not use this form for placing orders.	▶ Commodity Code not applicable.

 Professional Services/ Independent Consulting	<ul style="list-style-type: none"> ▶ Use this form to request Professional Services and Independent Consulting Agreements. 	<ul style="list-style-type: none"> ▶ Commodity Code and Account are specified by the person preparing the form. Please select <i>00331 - Consulting Services-55101</i> or <i>00170 - Professional Services-55102</i>, depending on the type of service to be performed.
 Relocation / Household Moves	<ul style="list-style-type: none"> ▶ Use this form for requests related to relocating faculty/staff in accordance with university policy. 	<ul style="list-style-type: none"> ▶ Default Commodity Code of <i>'00328 - Removal/Moving Reimb'</i>. This will make the Account default to <i>'57701'</i>.
 Standing Order Amt (for Arrowhead Orders)	<ul style="list-style-type: none"> ▶ This form is used solely for Arrowhead standing order purchases such as water and coffee delivery. 	<ul style="list-style-type: none"> ▶ Commodity Code and Account are specified by the person preparing the form.

Commodity Codes and Default Account

Commodity Code	Description & Account
00012	Audio/Visual Supply-52306
00017	Books-52307
00025	Chemicals-52201
00027	Cleaning Supplies-52308
00150	Computer Services-55051
00298	Construction-53910
00331	Consulting Services-55101
00329	Contracting Services-55102
00082	Custod/dining/uniforms-52308
00055	Custodial Services-51550
00278	Drugs/Pharmaceuticals-52104
00325	EH&S-env health & safety-55175
00265	Employee Dev/Train-57451
00330	Equip Inventorial-52603
00262	Equip Non-Inv Plant >5K-53520
00147	Equipment less than \$5K-52302
00307	Facility Rental/Food-57200
00085	Freight-Goods Trans-57101
00243	Furniture-52315
00089	Gases-Comp/frozen/liqd-52202
00093	Graphics Services-55300
00327	Healthcare Services-57820
00005	Independent Contractors-55102
00326	Insurance/Finance Svcs-50734

Commodity Code	Description & Account
00258	Invent Equip>\$5,000-52603
00109	Lab Animals-52204
00070	Lab Instruments-52203
00111	Lab Supplies-52203
00322	Law Enforcement Supply-52312
00332	Lease and Rental-54101
00120	Mail Handling-57051
00130	Medical Supplies-52113
00134	Membership-Prof/Tech-57201
00324	Music and Arts-52312
00323	Office Supplies-52301
00166	Printing-form/stationery-57301
00170	Professional Services-55102
00328	Removal/Moving Reimb-57701
00188	Repair/Alt-Owned Space-51552
00184	Repair/Maint Supply-52311
00198	Repair/Sci Instruments-54051
00195	Research Supplies-52203
00205	Security Svcs-Fire/Pol-55150
00208	Soft Maint/Lic Agrmnt-55053
00256	Software<\$5,000/Cpy-52305
00107	Supplies & Materials-52312
00226	Uniforms-52308
00227	Vehicle Leases-54101

- ▶ The Commodity Code provided for a line item will default the appropriate Account when the PO is sent to PeopleSoft. The Account will appear to be blank in BearBuy. If you want to override the default Account, this can be accomplished by editing the line item Accounting Code (chartfield) and entering the desired Account code.
- ▶ For more details on using the Accounting Codes (chartfields), refer to the Requester Quick Reference Guide.