

# Placing Non-Catalog Orders in BearBuy

You can find a lot of lab supplies, computer supplies and equipment, and office supplies from our contracted vendors (also referred to as “catalog vendors”) by searching the BearBuy catalog. From the home page, you can try entering search terms in the search box at the top of the page. You can add items to your cart from the results. This process generally works well for the items that our contracted suppliers carry. Many of them are giving us educational discounts, and we have systems in place to streamline the accounting procedures, so if you can find what you’re looking for from this type of search, you’re encouraged go this route for ordering those items.

For supplies and equipment that are not found in the BearBuy catalog, you’ll need to use the Non-Catalog Items form. It can be found on the home page, under Frequently Used Forms. After you click to open it, your cursor will be in the Enter Supplier box. Many vendors can be found just by typing the beginning of the name. If they’re set up in our system for ordering, the name should pop up for you to click on. If you can’t locate them, please contact us for help at [physi-finance@lists.berkeley.edu](mailto:physi-finance@lists.berkeley.edu).

Non-Catalog Items - Internet Explorer

https://solutions.sciquest.com/apps/Router/FavoritesFormEdit?&FavoriteProductId=5307664&wantReloadOnClose=5307664&FavPageContext=2&tmstmp=1629998718847122

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

**Non-Catalog Items**

**Non-Catalog Items**

**When to use this form:**

- [Detailed Instructions](#)
- To purchase goods / equipment that are not found in a BearBuy catalog. Equipment orders might have associated services that should accompany this order.
- To purchase tangible items that you take possession of or Merchandise that is received.
- When you have an 'After the Fact' (ATF) order that will require additional invoice payments in the future.
- Consult with a [Buyer](#) for purchases that may exceed \$10,000 or for purchases that fall into a [Special Considerations](#) category, prior to completing the order.
- Still unsure? Click to see [What Form Should I Use?](#)

**STOP: Do not use this form for:**

- Software Purchase or Cloud Services (Use Services and Non-Tangible Items Form)

**Supplier Information**

Enter Supplier

thorlabs x

- Thorlabs Imaging Research Group LLC
- Thorlabs Inc

**Existing Contracts:**

- The fastest procurement option is to use an existing contract. To see a list of potential contracts: [UCB BearBuy Contracts Module](#). For access to UCOP's [CalUSource](#) systemwide contracts, contact your [Buyer](#).
- If the supplier has an existing agreement in Bear Buy, click on "SELECT CONTRACT..." to associate it to the order.

Contract:

**For procurement instructions, please visit Supply Chain Management - [Procurement website](#).**

- Estimate the total cost of purchase if exact cost is unknown. Do not split orders or request partial purchase amounts as it will increase processing time and may result in multiple PO's being issued.

4DER level chartstring using Account Code 57810.

Once you've selected the supplier, there are some questions in the form that must be answered. For the majority of your regular purchases of lab supplies and instruments, you can just answer them this way:

1. "No" for Emp-Supplier Relation exist?
2. Just enter **your** name and email address as the "Project Manager," this won't have any bearing on anything
3. "No" for Employee Displaced?
4. "None of the above apply" for "describe the purchase"
5. "n/a" for Data Security Level

Emp-Supplier Relation exist?

1  No  
 Yes

If yes, attach the required [Conflict of Interest Disclosure Form](#)

### Order Information

Proposal/Quote No.

Prior Year PO Number (if applicable)

UC Berkeley Project Manager:

2

(Email & Phone No.)

Supplier Contact Name

(Email / Phone No.)

Where will Goods be delivered?

Installation Date

mm/dd/yyyy

Employee Displaced?

3  No  
 Yes

Using this dropdown list, describe the purchase

4  None of the above apply

What is the Data Security Level of this Order?

5  n/a

Continuing down the form:

1. Enter a description of the item (a description from the vendor's website works best) in Item Information
2. Enter a catalog or part number if there is one
3. Quantity
4. Price
5. Check the box for Taxable (yes, our orders are taxable)
6. Check "No" for "Does this transaction result from..."

The screenshot shows a procurement form with the following fields and callouts:

- 1**: Item Information field containing "Ø1/2" Post Holder, Spring-Loaded Hex-Locking Thumbscrew, L = 1"
- 2**: Catalog No. field containing "PH1"
- 3**: Quantity field containing "1"
- 4**: Unit Price field containing "7.24"
- 5**: Taxable checkbox, which is checked.
- 6**: Radio button for "No" under the question "Does this transaction result from a current or prior License or Agreement with Supplier?"

Additional form elements include:

- Manufacturer Name and Manufacturer Model Number fields.
- Commodity Code field with a search button.
- Health and Safety section with checkboxes for: Controlled substance, Recycled, Hazardous Materials, Radioactive, X-Ray & Laser, EH&S Review (Toxic, Hazardous), Biological Hazard/Select Agent, Toxin, Energy Star, and Green.
- Optional Services section with a text input field.
- Buttons: expand | clear, Go, Close, and a help icon (?)

**Fabrication Number is on the Purchase Requisition at the header level. If applicable, please make sure to select from the search option.**

**EH&S, X-Ray, Radio Active, & Laser Orders - Please make sure to check the box "EH&S Review/Toxic Gas" for all orders with toxic materials and/or "Radioactive, X-Ray, Laser" items.**

**Optional Services:** If there are optional services for equipment such as (installation, maintenance, training, etc.), enter the labor requirements as an individual line item above.

**To add additional goods or associated services, select "Add to Cart and Return" from the dropdown at the top right of the Form and hit "Go".**

Scroll back up to the top. If this first item is the only thing you're ordering, then click Go for Add and Go to Cart. If you have a list of things you're ordering, select Add to Cart instead, and click Go. This will add the first item to your cart, and also leave you within the form, with all the information you've entered intact. Scroll down to the Item Information field and delete the info for the first item, and paste in the info for your second item, and then do the same for the Catalog No., Quantity, and Unit Price fields, then go up top and Add to Cart again. Repeat this process until you get to your last item, and change the menu selection back to Add and Go to Cart, and click Go. (For very long lists of items, this process can be tedious, but unfortunately, it's necessary. Copy-and-paste should minimize the difficulty somewhat.)

riteProductId=5307664&FavPageContext=2&tmstmp=1629998759224

The screenshot shows the 'Available Actions' dropdown menu for 'Non-Catalog Items'. The menu options are:

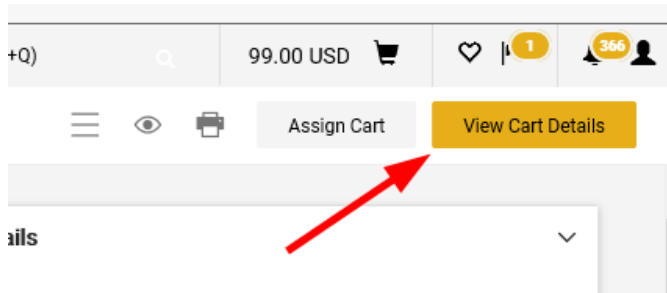
- Add and go to Cart
- Add to Cart and Return
- Add to Cart
- Add to Draft Cart or Pending PR/PO
- Add to Favorites
- Add to new Cart

Buttons: Go, Close, and a help icon (?)

arBuy catalog. Equipment orders might have associated services that should accompany this order.

Please note: if you're working from a quote that lists shipping charges and sales tax, don't try to include those amounts as line items in your cart! The PO that's sent to the vendor will instruct them on processing those costs.

The next screen will show a summary of what you've put in your cart. To enter your chartstring or speedtype, click on View Cart Details.

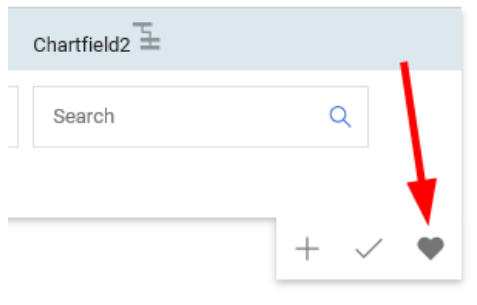


Then scroll down until you see the Accounting Codes section, and click on the little pencil icon to the right:

Accounting Codes							
Account	Speedtype	Fund	Federal Funds	Department	Function Code	Chartfield1	Chartfield2
no value ▲ Empty	none	no value ▲ Empty	no value	no value ▲ Empty	no value	no value	no value

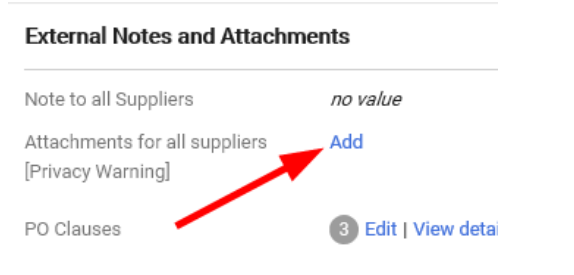
A screenshot of the 'Accounting Codes' section. The table has 8 columns: Account, Speedtype, Fund, Federal Funds, Department, Function Code, Chartfield1, and Chartfield2. Each cell contains 'no value' and a yellow triangle with the word 'Empty'. A red arrow points to a pencil icon in the top right corner of the table.

If you entered any speedtypes or chartstrings while setting up your profile, you can click on the little heart icon to bring up a list:

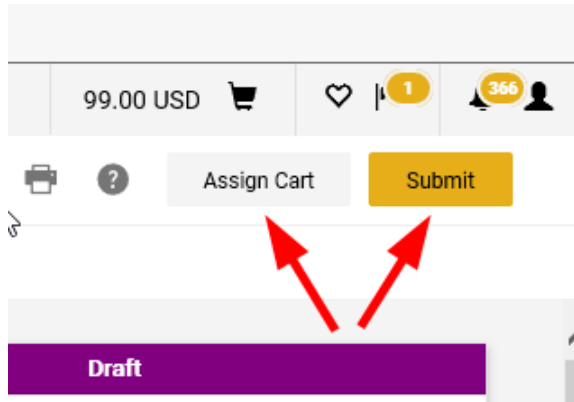


Click on the one you want, and the chartstring will populate the appropriate fields. Otherwise, enter the chartstring or speedtype in this section manually. If you're not sure which values go in which fields, contact us at [physi-finance@lists.berkeley.edu](mailto:physi-finance@lists.berkeley.edu). (Note: the Speedtype field cannot be left blank! If you don't have a speedtype, make sure to leave the word "none" in that field.) Click Save.

If you have a quotation from your supplier, there is a section below Accounting Codes where you should attach it. We recommend clicking the Add Attachments button on the right, for External Notes and Attachments, which will send a copy of the quotation back to the supplier along with the Purchase Order. This serves to make it clear to the supplier that the PO is based on their quotation.



Once you've entered your chartstring or speedtype and attached any relevant documents, you can move the cart forward in one of two ways. In the upper right corner are two buttons, Submit and Assign. Clicking Submit will send the cart into the workflow, and after necessary approvals have been given, a PO will be sent to the supplier (you'll receive an email from BearBuy letting you know this has happened, and the message will contain the PO number).



You can click Assign if your cart needs to be reviewed by someone else before it enters the workflow. Click the button and then "Search for an assignee." Once you've selected this person, you can check a box for "Add to Profile" which will make it quicker to assign carts to the same person in the future.