

PROCUREMENT: Non-Catalog Request

Overview

- This job aid is intended for all Ignite users.
- This job aid will cover how to use the requisition process to order goods and services that are not available in the Marketplace.
- What is the purpose of a requisition?
 - A requisition represents a request to use funds for a good or service and ensures that the appropriate budgetary approvals occur.
 - When the amount of the requisition exceeds \$25,000 or when no supplier has been identified in the requisition, it provides Procurement with the information needed to conduct a sourcing event or issue a purchase order.
- What is the purpose of a Purchase Order (PO)?
 - A PO is a form of agreement with a supplier. It stipulates terms and conditions that protect the University from commercial risks, and it authorizes the supplier to provide the goods or services within.
 - Suppliers must reference the PO number on their invoice to receive payment.
- When would you use a non-catalog request?
 - Non-catalog requests are used when the goods or services are not available in the Marketplace, or a payment request is not an appropriate method for making a purchase.
 - There are 3 primary instances when you would use a non-catalog request:
 - 1) To purchase goods or services from a supplier after a quote is received,
 - 2) To purchase goods or services from a supplier where there is an existing agreement but is not available in the marketplace,
 - 3) To request assistance from Procurement in identifying the right supplier, via a bid or other sourcing event, to purchase goods or services.
- What if items or services are available in the Marketplace, too?
 - The Marketplace should be used if the goods or services are available. If items are available in the Marketplace, a non-catalog request is not needed.

Note: If you need to cancel a Non-Catalog requisition that has been already sourced into a PO, please work with the Buyer.

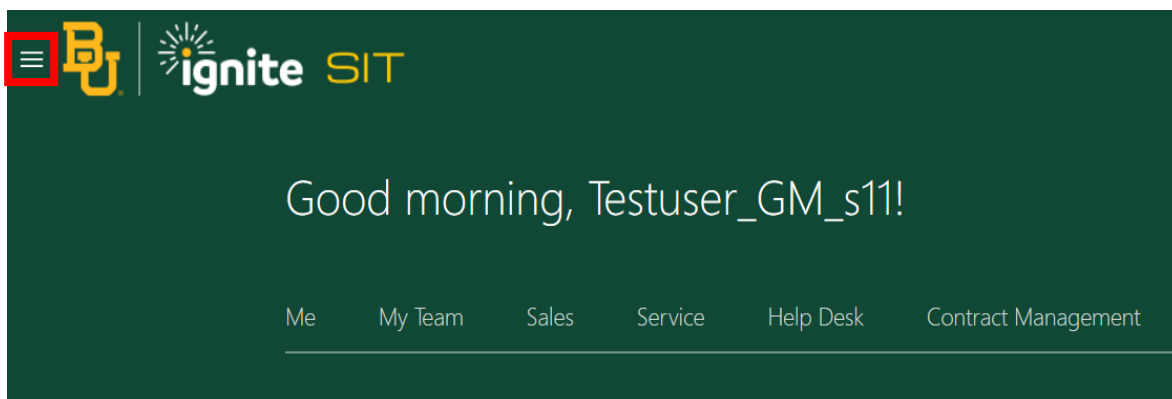
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- How do you submit a request that includes both goods and services?
 - Use the following steps for this request type:
 1. Use the non-catalog goods form to create a request for the desired good(s) items and add the items to the cart.
 2. Click Done after the item is entered in the cart, and you will be returned to the requisition screen.
 3. Use the non-catalog services form to create a request for the desired service(s) and add the items to the cart.
 4. When finished click on the cart to review and submit the items.
 5. You will see a requisition has been created with both goods and services lines and is available for submission.
- What does it mean when items are in your shopping cart?
 - The shopping cart is a list of all the request lines that have been entered by the requester but have not yet been submitted. Items within the cart combine to form a single requisition with multiple lines.

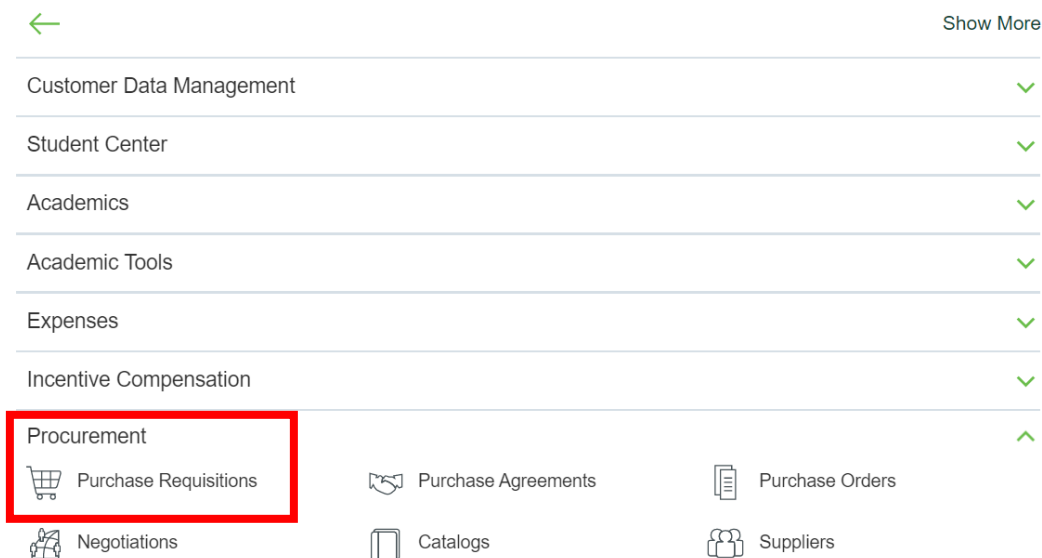
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I. Navigating to the Non-Catalog Goods or Services

- I. The **Purchase Requisitions** task can be accessed two ways:
 - a. (Option 1) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

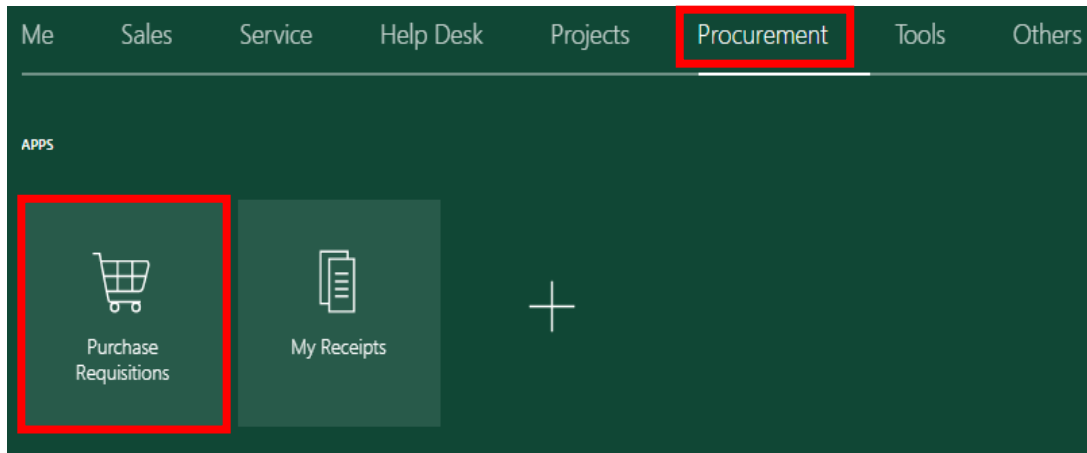


- b. Under the **Procurement** section, click the drop-down arrow, and select **Purchase Requisitions** from the drop-down list.



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- c. (Option 2) Under the **Procurement** heading on the home page, scroll down and click on the **Purchase Requisitions** tile on the main page.



2. Upon entering the **Purchase Requisitions** tile, under the **Top Categories** section click the **Goods – Non-Catalog** or the **Services – Non-Catalog** icon.

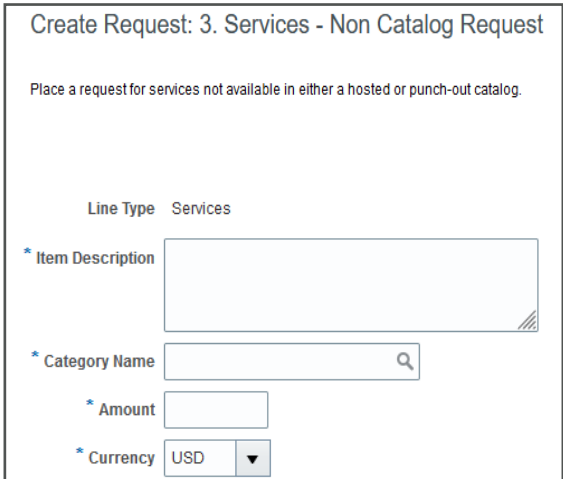
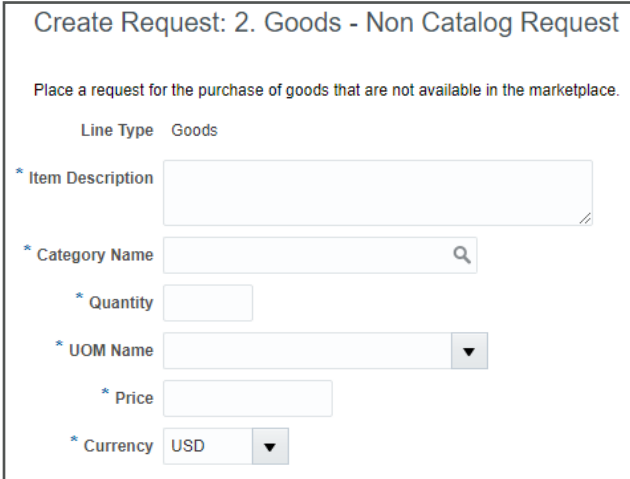


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2. Creating a Non-Catalog Request

- I. You will be redirected to the **Create Request** page.
 - a. For a **Goods – Non Catalog Request**, enter the following information:
 - i. **Item Description:** Description of item(s) you are requesting.
 - ii. **Category Name:** Category of item(s) you are requesting. Use the search function to determine which category applies to your request.
 - iii. **Quantity:** Total number of items you are requesting.
 - iv. **UOM Name:** Unit of measure to describe the quantity of goods
 - v. **Price:** Unit price for the item(s)
 - vi. **Currency:** Defaults to USD

Note: Each distinct item should be entered on its own line with the appropriate quantity, UOM, and unit price.



- b. For a **Services – Non Catalog Request**, enter the following information:
 - i. **Item Description:** Description of Service you are requesting.
 - ii. **Category Name:** Category of service you are requesting. Use the search function to determine which category applies to your request.
 - iii. **Amount:** The cost of the service being performed.
 - iv. **Currency:** Defaults to USD.

Note: The steps from here are the same for both Goods and Services Non Catalog Requests, even though the screen shots depict a Goods – Non Catalog Request.

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2. If the purchase is from a previously negotiated agreement with the supplier, an agreement number must be populated. In the **Agreement** field, you may type in the agreement number for this requisition, or you may use the field's search function to locate the correct agreement number. Baylor Procurement is also available to help you select the correct agreement if there are multiple agreements for the supplier. Once an agreement is selected, the supplier information will fill in automatically.

A screenshot of a procurement form. The 'Agreement' field is highlighted with a red box. Below it are fields for 'Supplier', 'Supplier Site', 'Supplier Contact', 'Phone', 'Fax', 'Email', and 'Supplier Item'. The 'Supplier' field has a search icon. The 'Supplier Site' and 'Supplier Contact' fields are dropdown menus. The 'Phone', 'Fax', and 'Email' fields are text input boxes. The 'Supplier Item' field is a text input box.

3. If the purchase request is not related to a contract, then you must populate the **Supplier** field by using the search function or by directly typing the supplier's name. If there are multiple **Supplier Sites** (addresses), select the appropriate option from the dropdown. The remaining supplier contact fields will fill in automatically based on the supplier selection. If the requisition is submitted with the supplier field left blank, the approved requisition will be routed to Procurement to assist with supplier selection and sourcing. For the **Supplier Item**, enter the Supplier's SKU or the Manufacturer's Part Number.

A screenshot of a procurement form. The 'Supplier', 'Supplier Site', and 'Supplier Item' fields are highlighted with red boxes. The 'Agreement' field is also visible. Below it are fields for 'Supplier', 'Supplier Site', 'Supplier Contact', 'Phone', 'Fax', 'Email', and 'Supplier Item'. The 'Supplier' field has a search icon. The 'Supplier Site' and 'Supplier Contact' fields are dropdown menus. The 'Phone', 'Fax', and 'Email' fields are text input boxes. The 'Supplier Item' field is a text input box.

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- Under the **Attachments** section, use the **+** icon, to attach all necessary documentation, such as a quote from the supplier, other purchase justification documents or a sole-source form.

Attachments

View ▾ **+** ✕

Type	Category	* File Name or URL	Title
No data to display.			

- Once the necessary information is provided and the requisition is complete, click **Add to Cart**.

[Add to Shopping List](#) **Add to Cart** [Done](#) 

Agreement

Supplier

Supplier Site

Supplier Contact

Phone

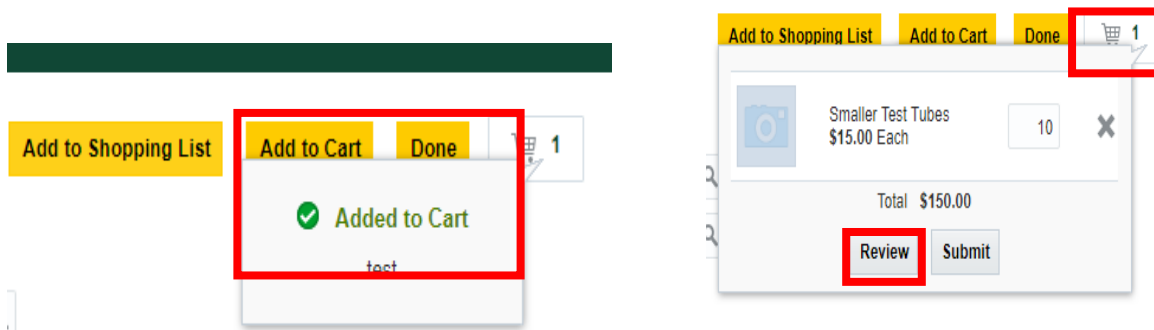
Fax

Email

Supplier Item

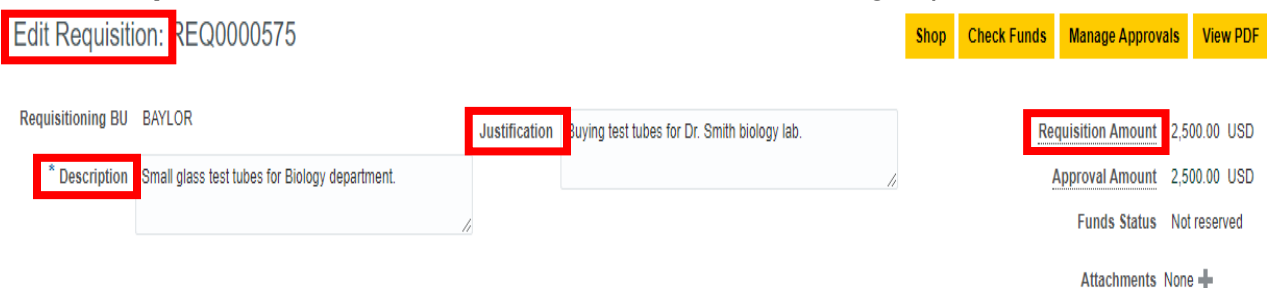
- The item will be added to the cart. Continue to add items to the cart using the process explained above until all items are recorded appropriately. Then, click the **Cart** icon and click **Review**.

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3. Review/Edit Requisition Information

- I. This will bring you to the **Edit Requisition** page.
 - a. **Description:** this defaults from the Create request page.
 - b. **Justification:** add information to explain to requisition approvers the desired purpose for the purchase request
 - c. **Requisition Amount:** the total amount of the non-catalog requisition



2. Review each requisition line to ensure the details populated correctly. If you need to edit a line, highlight the row, then click the **pencil** icon.

Requisition Lines

Line	Description
1	Furniture for classroom
Total	

Rows Selected 1 Columns Hidden 8

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- a. A pop-up will appear with the line information. Edit the line information as necessary, then click **OK**.

Edit Line: 1

Line Type	Goods	Agreement	<input type="text"/>
* Item Description	<input type="text" value="Smaller Test Tubes"/>	Supplier	<input type="text" value="Arun W. Jones"/>
* Category Name	<input type="text" value="Lab Gasses"/>	Supplier Site	<input type="text" value="Site0000011"/>
* Quantity	<input type="text" value="10"/>	Supplier Contact	<input type="text" value="Jones, Arun"/>
* UOM Name	<input type="text" value="Each"/>	Phone	<input type="text"/>
* Price	<input type="text" value="15.00"/>	Fax	<input type="text"/>
* Currency	<input type="text" value="USD"/>	Email	<input type="text" value="test_arun.w.jones@emory.edu"/>
		Supplier Item	<input type="text"/>

OK Cancel

3. The **Deliver-to Location** and **Charge Account** will auto-populate based on the information saved in your **Requisition Preferences**. *If you need to set up or change these preferences, see the Job Aids: Requisition Preferences – Charge Account COA-POETAF or Requisition Preferences – Shipping & Delivery Address.* These can be changed, if needed.

Deliver-to Location Type

* Deliver-to Location

Deliver-to Address

Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status
<input type="text" value="110-10745-100-1000000-97510-701-01"/>	<input type="text" value="01/23/2020"/>	<input type="text" value="100"/>	<input type="text" value="10"/>	<input type="text" value="2,500.00"/>	Not reserved
Total			100	10	2,500.00

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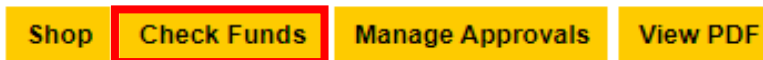
- In the **Billing** section, review the **Charge Account** information for each line item. If you need to charge your requisition to a sponsored program, you can enter the **Project Number** in this section, or select a pre-defined charge account by changing the **Charge Account Nickname**.

Distribution	Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Contract Number	Funding Source	Charge Account Nickname	Charge Account
1	<input type="text"/>						office supplies		110-10745-100-1000000-00000-701-00
Total									

Note: The Account segment of the chart of accounts can only be changed by selecting a different procurement category.

4. Submitting a Non-Catalog Requisition for Approval

- After confirming that the requisition form is correct and complete, select **Check Funds** to confirm that budgetary funds are available.



Requisition Amount 2,500.00 USD

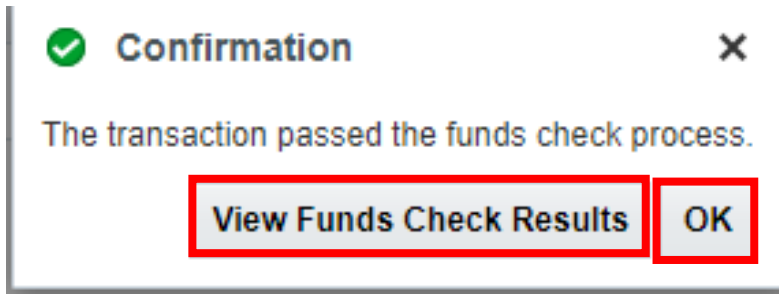
Approval Amount 2,500.00 USD

Funds Status Not reserved

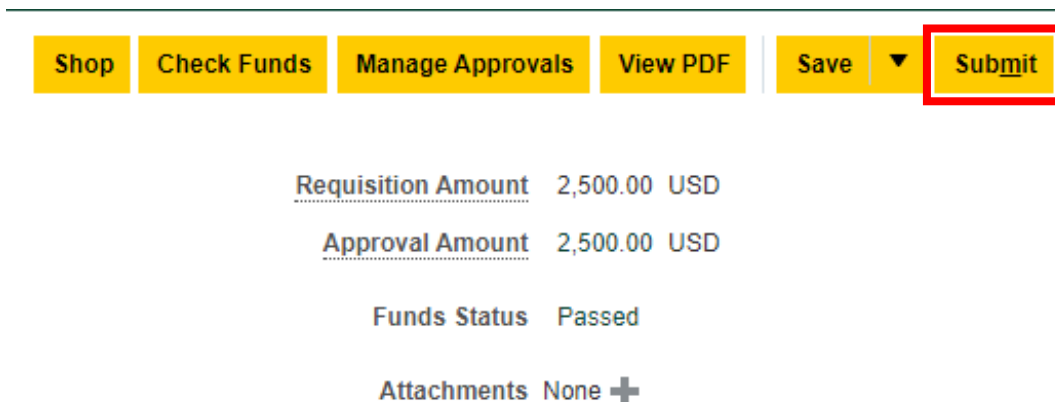
Attachments None +

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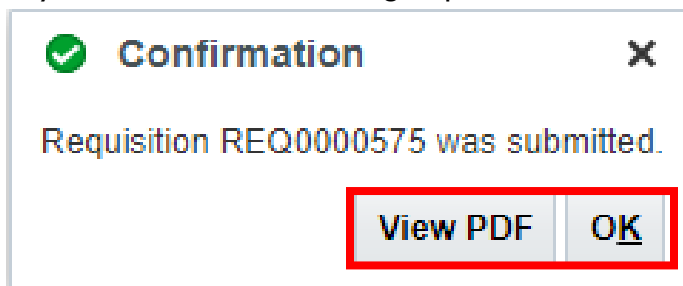
2. On the pop-up, click **OK**, or you can select **View Funds Check Results** for the budget check summary.



3. Review the information and then click the **Submit** button.



5. On the confirmation pop-up, select **OK** to close or click **View PDF** to see a PDF version of your submitted non-catalog requisition.



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6. The requisition is now pending approval. You can see your requisitions and the status of each under **Recent Requisitions**.

Recent Requisitions		View More
REQ0000575	Small glass test tubes for Biology department.	Pending approval
REQ0000573	Credenza	Incomplete
REQ0000548	Smaller Test Tubes	✘ Rejected
REQ0000512	test	Incomplete
REQ0000498	Staples Wire Mesh Pen Cup, Black (25283)	✘ Rejected