

## Procurement: Create a Non-Catalog Requisition

*For employees creating a non-catalog requisition*

**Purpose:** Create a non-catalog requisition.

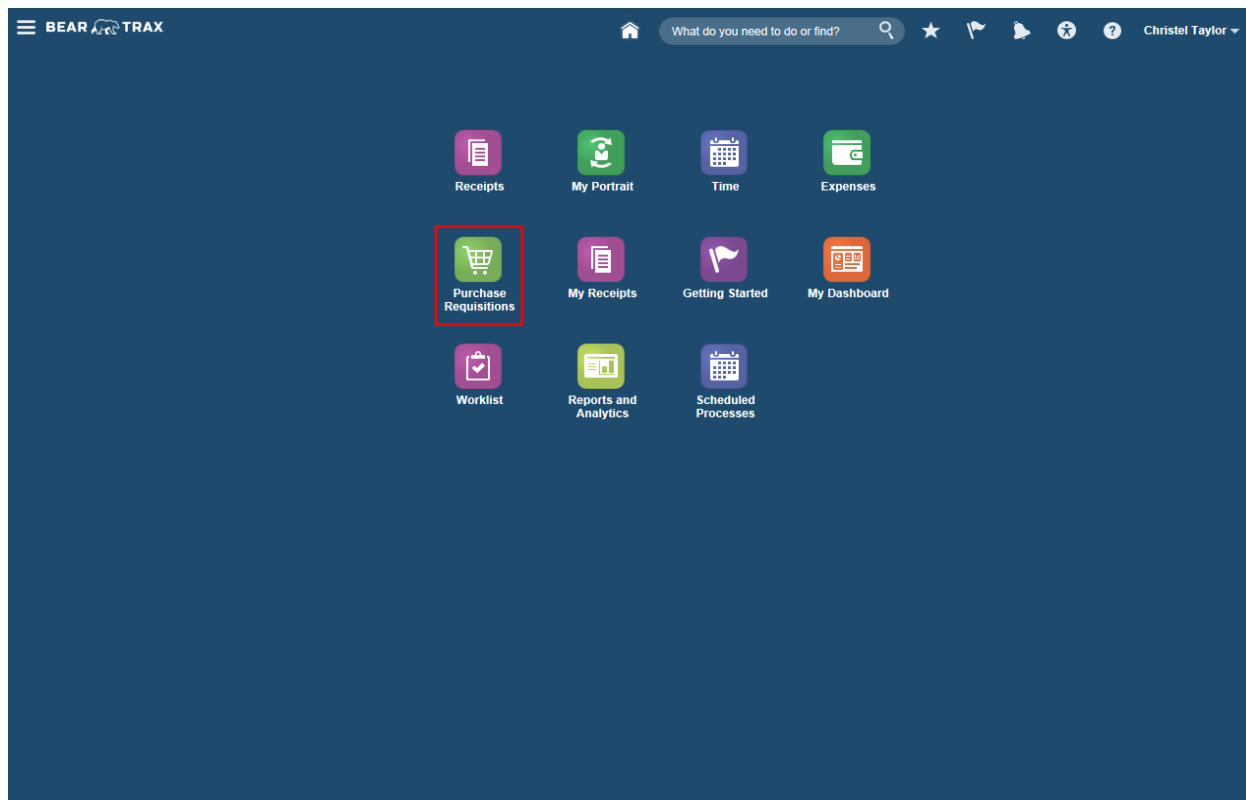
**How to Access:** Log into the [Bear Trax](#) application. Select the **Procurement** task in the Navigator.

**Helpful Hints:** Be sure to keep in mind that...

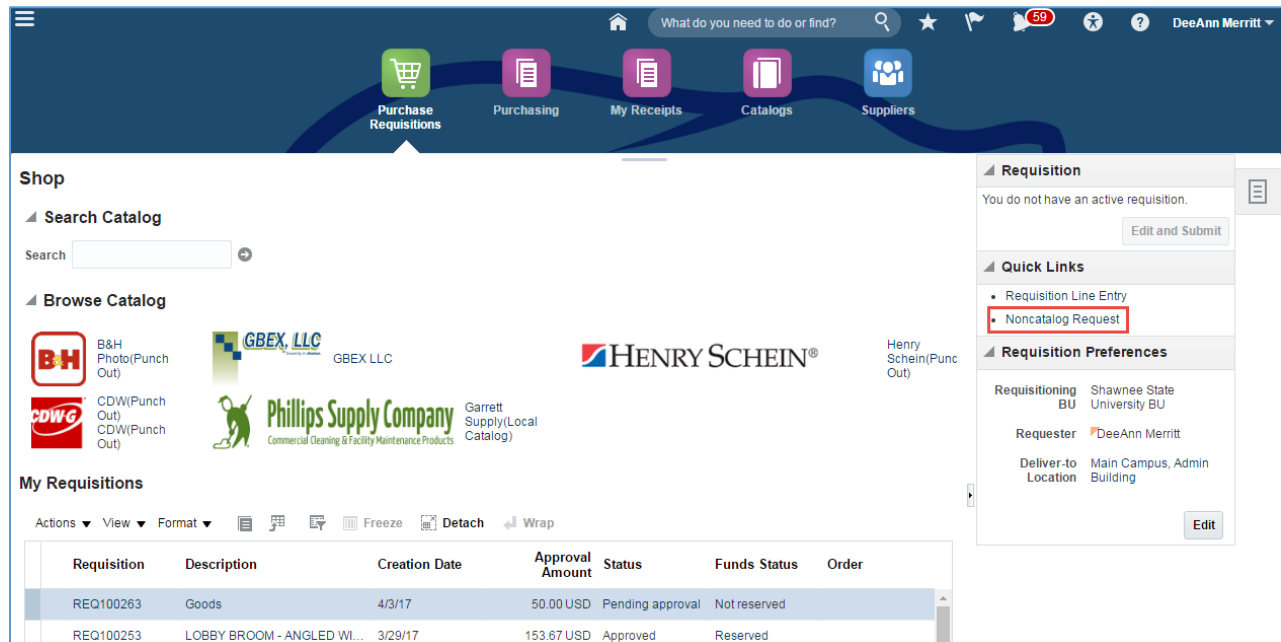
- This requisition type should be used if creating a requisition outside of existing catalogs
- The other two requisition types are local catalog and punch-out catalog
- All fields marked with an asterisk, \*, are required to be filled.
- Quotes and other necessary information can be attached.

**Procedure:** Complete the following steps to create a non-catalog requisition:

1. Click on the **Purchase Requisitions** icon.



2. On the right hand side of the page Under **Quick Links**, select **Non-catalog Request**.



**Shop**

Search Catalog

Browse Catalog

**My Requisitions**

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ100263	Goods	4/3/17	50.00 USD	Pending approval	Not reserved	
REQ100253	LOBBY BROOM - ANGLED WI...	3/29/17	153.67 USD	Approved	Reserved	

**Quick Links**

- Requisition Line Entry
- Noncatalog Request**

**Requisition Preferences**

Requisitioning BU: Shawnee State University BU

Requester: DeeAnn Merritt

Deliver-to Location: Main Campus, Admin Building

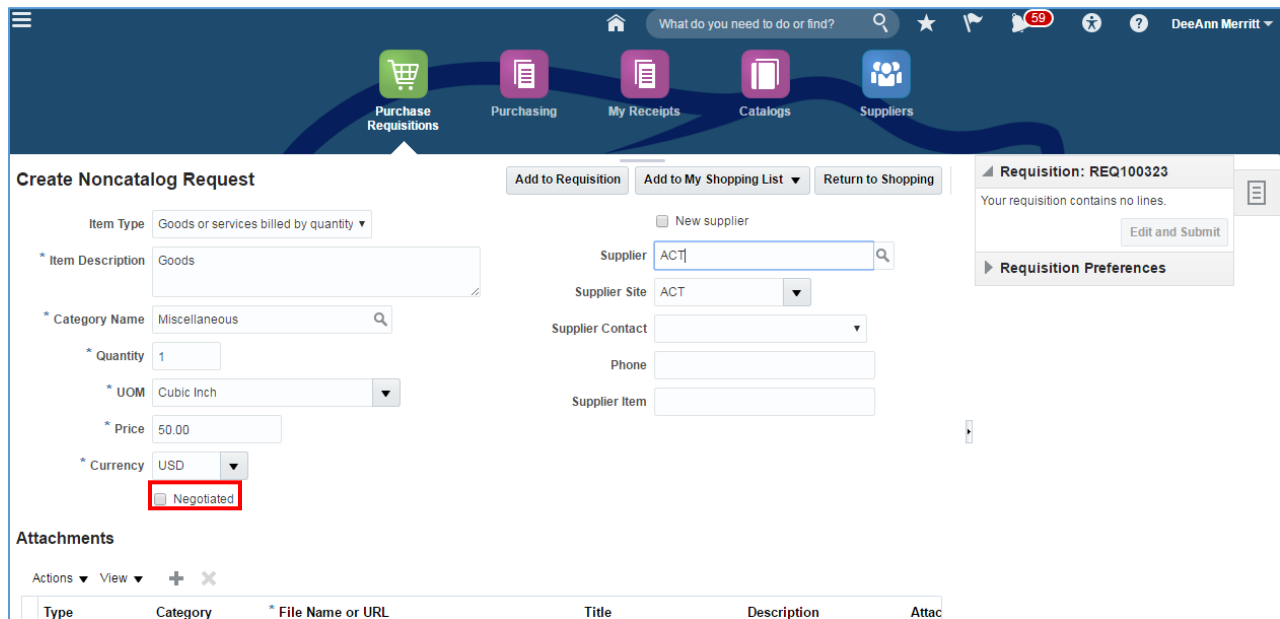
3. Complete the following fields:

Item Description	Description for the item is to be given
<b>Category</b>	User can choose Category from the drop-down
<b>Quantity</b>	Mention the quantity for the item
<b>UOM</b>	User can Enter the Unit of Measure from the drop-down
<b>Price</b>	Enter the price for the Item
<b>Currency</b>	User can select the Currency from the drop-down
<b>Supplier</b>	User can Choose the Supplier through the search icon
<b>Negotiated</b>	User must check this box for a Purchase Order to be created

**Note:** Fields marked with an asterisk \* are required.

**Note:** If **Supplier** is new, follow the existing University process and fill out a form to register the new vendor.

**IMPORTANT:** Make sure you check the **Negotiated** box—if left unchecked, the system will not automatically create a Purchase Order for the requisition.



**Create Noncatalog Request**

Item Type: Goods or services billed by quantity

\* Item Description: Goods

\* Category Name: Miscellaneous

\* Quantity: 1

\* UOM: Cubic Inch

\* Price: 50.00

\* Currency: USD

☐ Negotiated

Supplier: ACT

Supplier Site: ACT

Supplier Contact:

Phone:

Supplier Item:

Buttons: Add to Requisition, Add to My Shopping List, Return to Shopping

Requisition: REQ100323

Your requisition contains no lines.

Edit and Submit

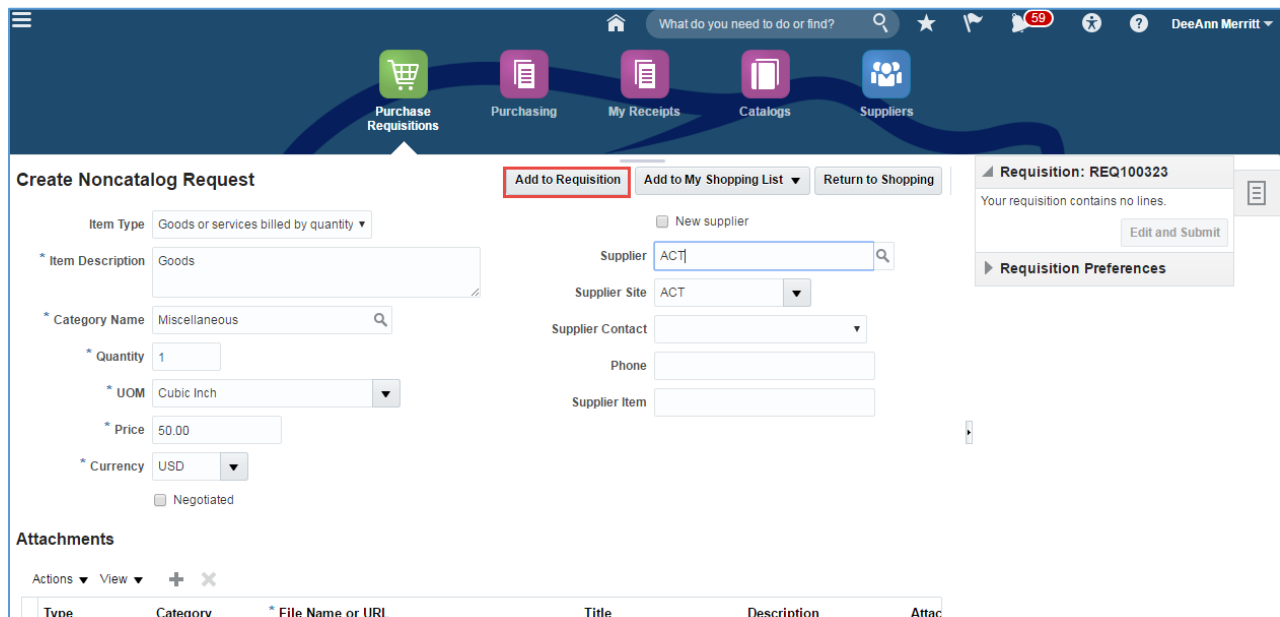
Requisition Preferences

Attachments

Actions View + -

Type	Category	* File Name or URL	Title	Description	Attac
------	----------	--------------------	-------	-------------	-------

4. Click **Add to Requisition** once you have added all required information.



**Create Noncatalog Request**

Item Type: Goods or services billed by quantity

\* Item Description: Goods

\* Category Name: Miscellaneous

\* Quantity: 1

\* UOM: Cubic Inch

\* Price: 50.00

\* Currency: USD

☐ Negotiated

Supplier: ACT

Supplier Site: ACT

Supplier Contact:

Phone:

Supplier Item:

Buttons: Add to Requisition, Add to My Shopping List, Return to Shopping

Requisition: REQ100323

Your requisition contains no lines.

Edit and Submit

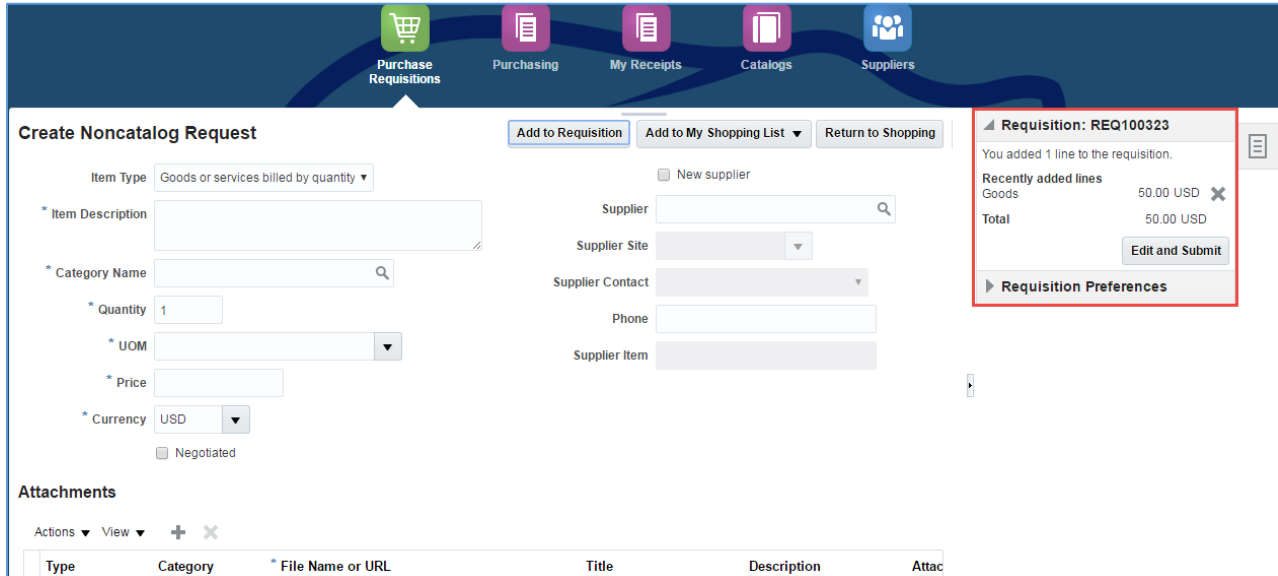
Requisition Preferences

Attachments

Actions View + -

Type	Category	* File Name or URL	Title	Description	Attac
------	----------	--------------------	-------	-------------	-------

New requisition information will display on the top right side of the page.



**Create Noncatalog Request**

Item Type: Goods or services billed by quantity

\* Item Description: [Text Field]

\* Category Name: [Text Field]

\* Quantity: 1

\* UOM: [Dropdown]

\* Price: [Text Field]

\* Currency: USD

☐ Negotiated

Supplier: [Text Field]

Supplier Site: [Dropdown]

Supplier Contact: [Text Field]

Phone: [Text Field]

Supplier Item: [Text Field]

**Requisition: REQ100323**

You added 1 line to the requisition.

**Recently added lines**

Goods	50.00 USD	X
<b>Total</b>	<b>50.00 USD</b>	

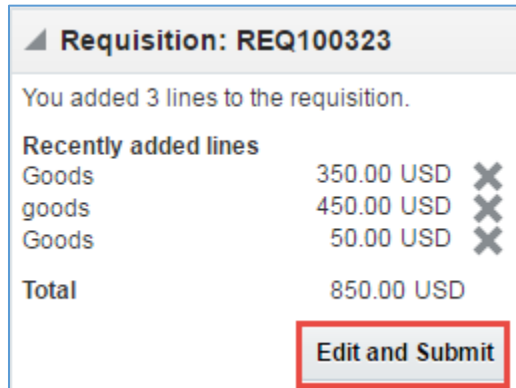
**Edit and Submit**

**Attachments**

Actions: View, +, X

Type	Category	* File Name or URL	Title	Description	Attac
------	----------	--------------------	-------	-------------	-------

5. Click on **Edit and Submit** once all items have been added to the requisition.



**Requisition: REQ100323**

You added 3 lines to the requisition.

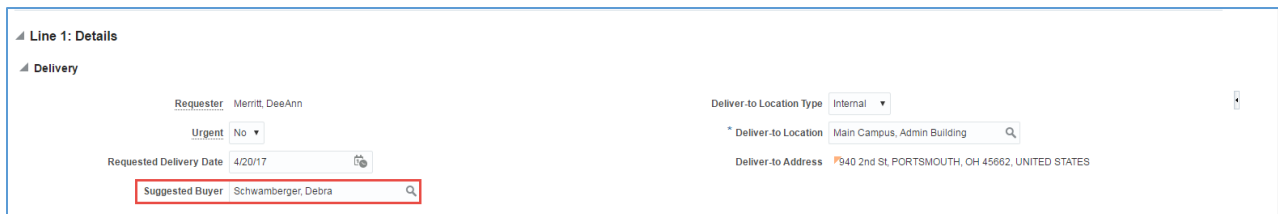
**Recently added lines**

Goods	350.00 USD	X
goods	450.00 USD	X
Goods	50.00 USD	X
<b>Total</b>	<b>850.00 USD</b>	

**Edit and Submit**

6. Review the details and **add** any additional details as needed.

**IMPORTANT:** Make sure to fill out the **Suggested Buyer** field with *Schwamberger, Debra* from Procurement Services.



**Line 1: Details**

**Delivery**

Requester: Merritt, DeeAnn

Urgent: No

Requested Delivery Date: 4/20/17

**Suggested Buyer: Schwamberger, Debra**

Deliver-to Location Type: Internal

\* Deliver-to Location: Main Campus, Admin Building

Deliver-to Address: P940 2nd St, PORTSMOUTH, OH 45662, UNITED STATES

**Note:** Make sure to fill out the **Suggested Buyer** field for each line of each Charge Account included in the requisition. If this action is not completed, the

## Split an Item

Follow these steps if you need to charge an item on a requisition to more than one unit.

7. Click on the **Actions** drop-down menu and select **Split**.

**Billing**

Actions View Format X < Freeze Detach Wrap

* Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
10-1010-50-10074-61102-10000-000	4/13/17	100	1	50.00	Not reserved	X
<b>Total</b>		<b>100</b>	<b>1</b>	<b>50.00</b>		

Columns Hidden 1

8. Two charge account lines will appear with empty fields: **Percentage** and **Quantity**. Enter the **percent** that should be split or the **quantity**. The fields will automatically calculate once a value is entered.

Actions View Format X < Freeze Detach Wrap

* Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
10-1010-50-10074-61102-10000-00000	4/13/2017	100	1	50.00	Not reserved	X
10-1010-50-10074-61102-10000-000	4/13/17				Not reserved	X
<b>Total</b>		<b>100</b>	<b>1</b>	<b>50.00</b>		

**Note:** Be sure to double check that the system calculated correctly. If there is any discrepancy and it does not total 100 percent, a warning will appear upon saving or submitting. When entering a percentage value, the system will not automatically populate the remainder in the other box.

**Billing**

Actions View Format X < Freeze Detach Wrap

* Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
10-1010-50-10074-61102-10000-000	4/13/2017	50	0.5	25.00	Not reserved	X
10-1010-50-10074-61102-10000-00000	4/13/17	50	0.5	25.00	Not reserved	X
<b>Total</b>		<b>100</b>	<b>1</b>	<b>50.00</b>		

## Delete an item

Follow these steps if a split item needs to be deleted (e.g. split in error). The item can be deleted prior to submitting the requisition.

9. Highlight the charge account line.

Billing

Actions

View

Format

Freeze

DetachWrap

* Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
10-1010-50-10074-61102-10000-000	4/13/17	50	0.5	25.00	Not reserved	<div></div>
10-1010-50-10074-61102-10000-00000	4/13/17	50	0.5	25.00	Not reserved	<div></div>
Total			100	1	50.00	

Columns Hidden 1

10. Click on the **Actions** drop-down menu.

Billing

Actions

View

Format

Freeze

Detach

Wrap

* Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
10-1010-50-10074-61102-10000-000	4/13/17	50	0.5	25.00	Not reserved	
10-1010-50-10074-61102-10000-00000	4/13/17	50	0.5	25.00	Not reserved	
Total		100	1	50.00		

Columns Hidden 1

11. Click **Delete** or click on the **X** on the right side of the page next to the highlighted item.

The item will be removed from the list.

Billing							
Actions ▾ View ▾ Format ▾ ✕ ⌂ Freeze Detach Wrap							
Delete account Split -10074-61102-10000-000							
* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete		
4/13/17	50	0.5	25.00	Not reserved	✕		
4/13/17	50	0.5	25.00	Not reserved	✕		

12. Add any necessary notes to the Supplier. If quotes are obtained by the initiating unit, a quote number will appear in the note field.

**Notes and Attachments**

Note to Supplier

Attachments None +

**Source**

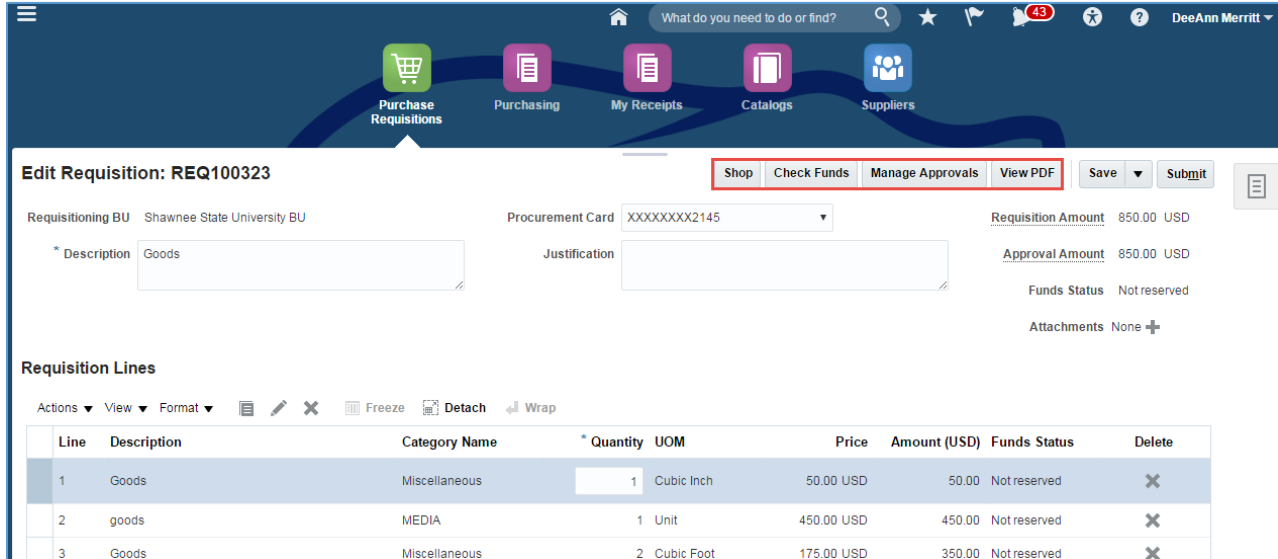
Agreement Type

Supplier

ACT

Agreement

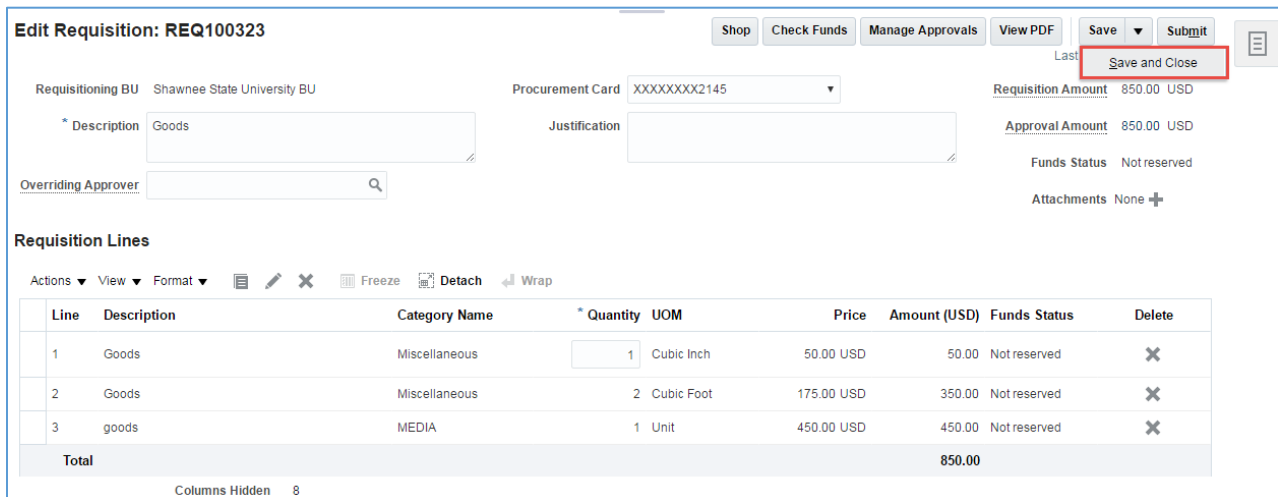
**Note:** There are action buttons at the top of the page. These are OPTIONAL, and not required to complete the requisition.



Line	Description	Category Name	* Quantity	UOM	Price	Amount (USD)	Funds Status	Delete
1	Goods	Miscellaneous	1	Cubic Inch	50.00 USD	50.00	Not reserved	X
2	goods	MEDIA	1	Unit	450.00 USD	450.00	Not reserved	X
3	Goods	Miscellaneous	2	Cubic Foot	175.00 USD	350.00	Not reserved	X

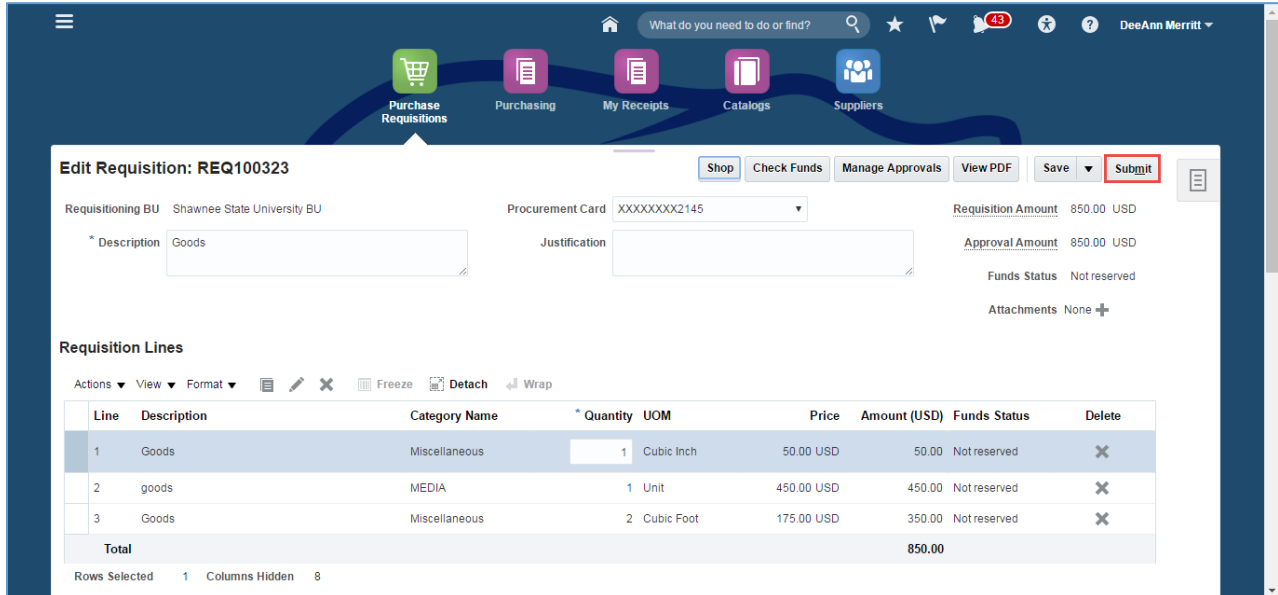
Icon	Action
Shop	Takes users back to the home page
Manage Approvals	Shows requisition status and hierarchy of the approval process
View PDF	Opens a new window with a PDF version of the requisition

13. Click **Save and Close** to save changes and close out of the page if you are not ready to submit the requisition. The requisition will be in **Incomplete** status until it is submitted.



Line	Description	Category Name	* Quantity	UOM	Price	Amount (USD)	Funds Status	Delete
1	Goods	Miscellaneous	1	Cubic Inch	50.00 USD	50.00	Not reserved	X
2	Goods	Miscellaneous	2	Cubic Foot	175.00 USD	350.00	Not reserved	X
3	goods	MEDIA	1	Unit	450.00 USD	450.00	Not reserved	X
<b>Total</b>						<b>850.00</b>		

14. Click **Submit** to send it through the approval process.



**Edit Requisition: REQ100323**

Requisitioning BU: Shawnee State University BU

Procurement Card: XXXXXXXX2145

Requisition Amount: 850.00 USD

Approval Amount: 850.00 USD

Funds Status: Not reserved

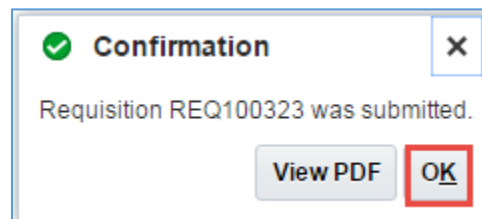
Attachments: None

**Requisition Lines**

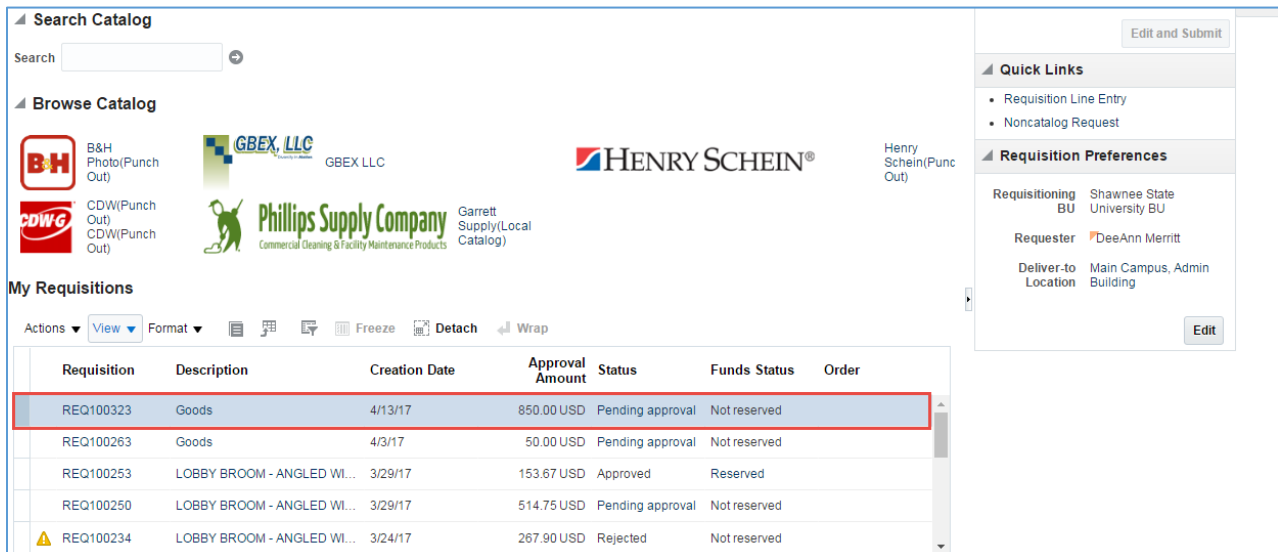
Line	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Funds Status	Delete
1	Goods	Miscellaneous	1	Cubic Inch	50.00 USD	50.00	Not reserved	X
2	goods	MEDIA	1	Unit	450.00 USD	450.00	Not reserved	X
3	Goods	Miscellaneous	2	Cubic Foot	175.00 USD	350.00	Not reserved	X
<b>Total</b>						<b>850.00</b>		

Rows Selected: 1 Columns Hidden: 8

15. A confirmation window will appear. Click **OK**.



The new requisition line item appears under **My Requisitions** and is pending approval status.



**Search Catalog**

Search: [ ]

**Browse Catalog**

B&H Photo(Punch Out)

CDW(Punch Out)

CDW(Punch Out)

GBEX, LLC

Phillips Supply Company

Garrett Supply(Local Catalog)

HENRY SCHEIN®

Henry Schein(Punch Out)

**My Requisitions**

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ100323	Goods	4/13/17	850.00 USD	Pending approval	Not reserved	
REQ100263	Goods	4/3/17	50.00 USD	Pending approval	Not reserved	
REQ100253	LOBBY BROOM - ANGLED WL...	3/29/17	153.67 USD	Approved	Reserved	
REQ100250	LOBBY BROOM - ANGLED WL...	3/29/17	514.75 USD	Pending approval	Not reserved	
REQ100234	LOBBY BROOM - ANGLED WL...	3/24/17	267.90 USD	Rejected	Not reserved	

**Quick Links**

- Requisition Line Entry
- Noncatalog Request

**Requisition Preferences**

Requisitioning BU: Shawnee State University BU

Requester: DeeAnn Merritt

Deliver-to Location: Main Campus, Admin Building

Edit and Submit

Edit



### Final Notes

By following these steps, you have successfully created a non-catalog requisition and submitted it for approval or saved the requisition to be filled out later.