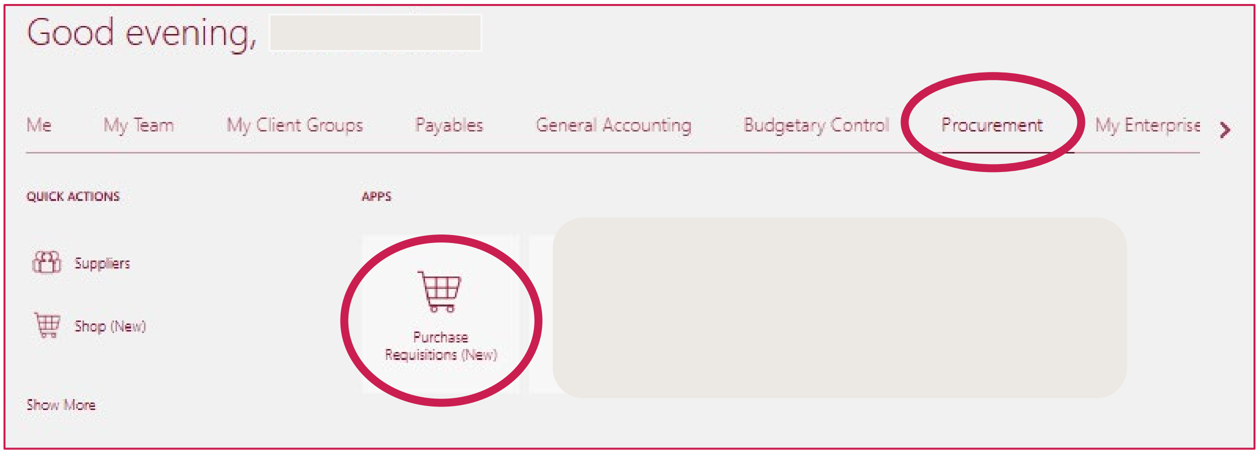
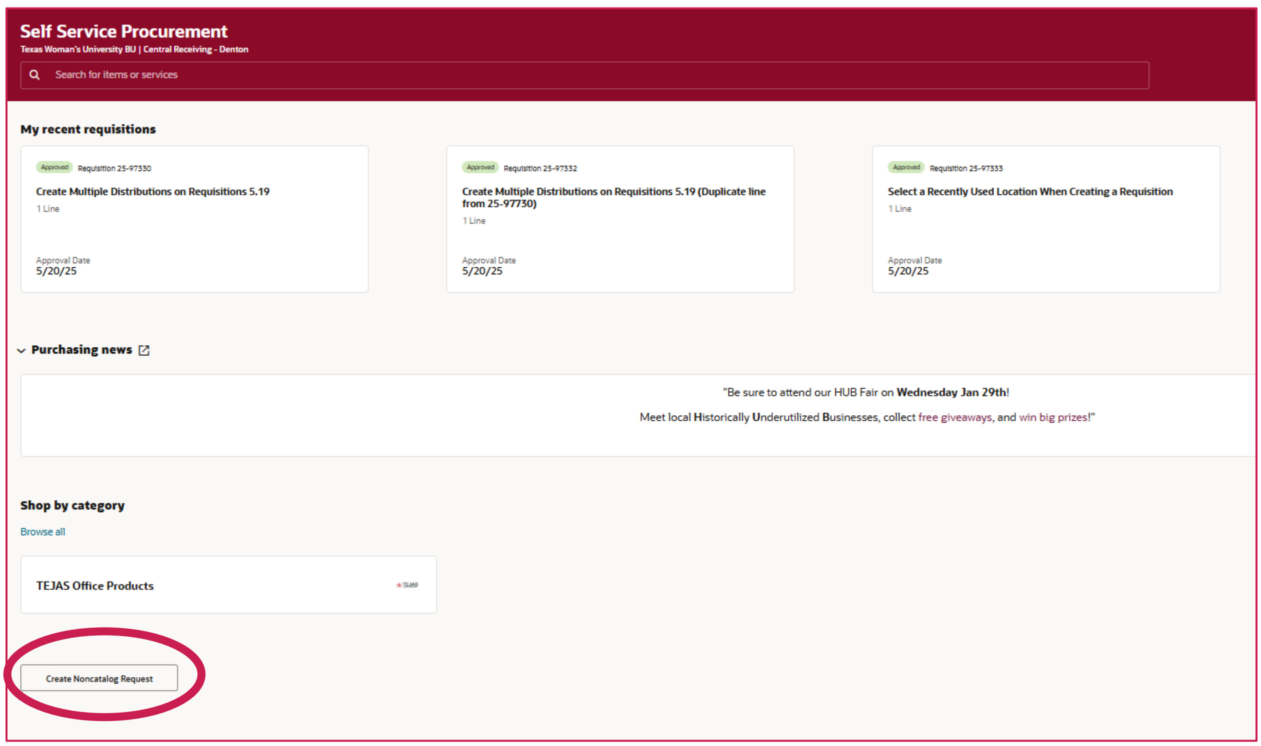
How to Create a Noncatalog Request – Sponsored Projects Only

1. Navigate to **Procurement** > **Purchase Requisitions (New)**



2. Scroll down to click "**Create Noncatalog Request**" at bottom of page

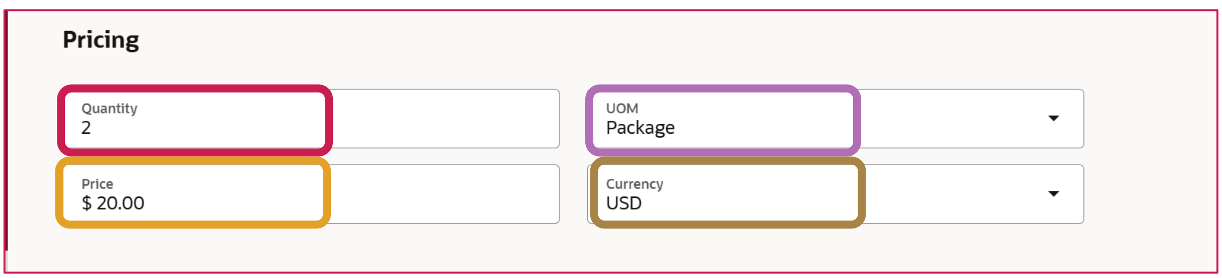


Adding Line Items

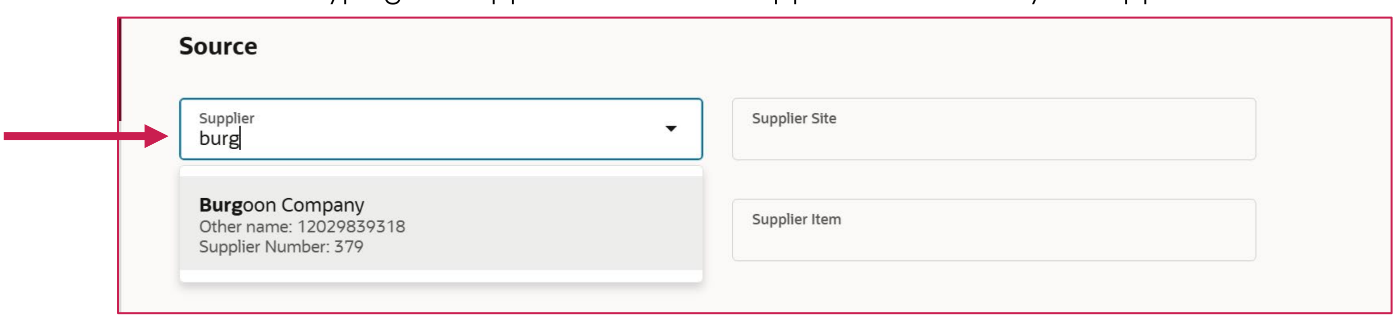
In this first section, you'll add information for ONE line item from your quote. There will be an option to add more line items later.

3. Item Description: Enter line items from your quote here.
4. Item Type: Choose **Goods billed by quantity** -or- **Services billed by quantity**.
5. Category: Select the category that best matches your item(s).

6. **Pricing:**
   - Qty (Quantity)
   - UOM (Unit of Measure): Choose the unit of measure that best matches your item(s).
   - Price: Enter the price per unit of measure. (Example: You're buying two 10pks of something. Each 10pk is quoted at $20, so you would enter $20.)
   - Currency: USD



7. **Source:** Start typing the supplier's name into Supplier and choose your supplier if available.

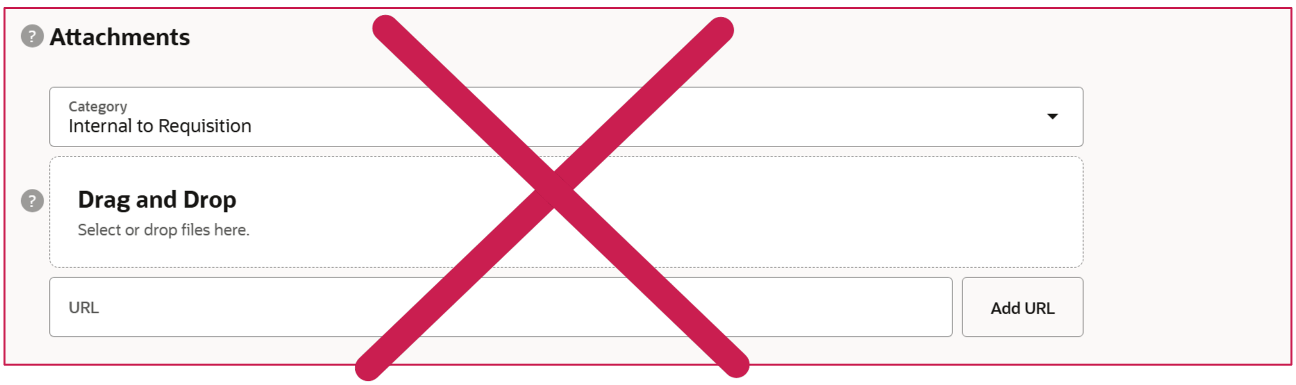


8. **Additional Information:** Ignore this section and move on to Notes.

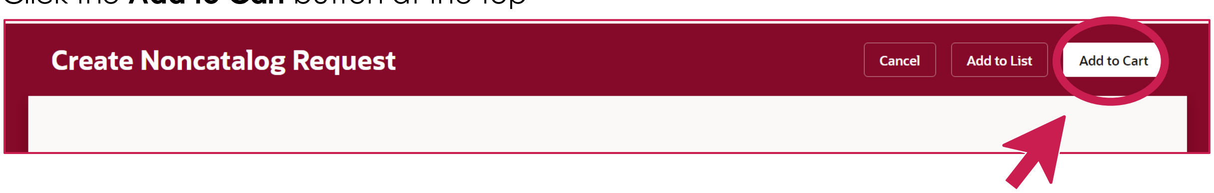
9. **Notes:** Enter notes to supplier if needed. (Example: Project Manager, room number, special delivery instructions, etc.)

10. **Attachments:** **DO NOT ADD ATTACHMENTS IN THIS SECTION**

This section is an unfortunate remnant of the original Oracle implementation. If we could get rid of it, we would. For now, just ignore it.

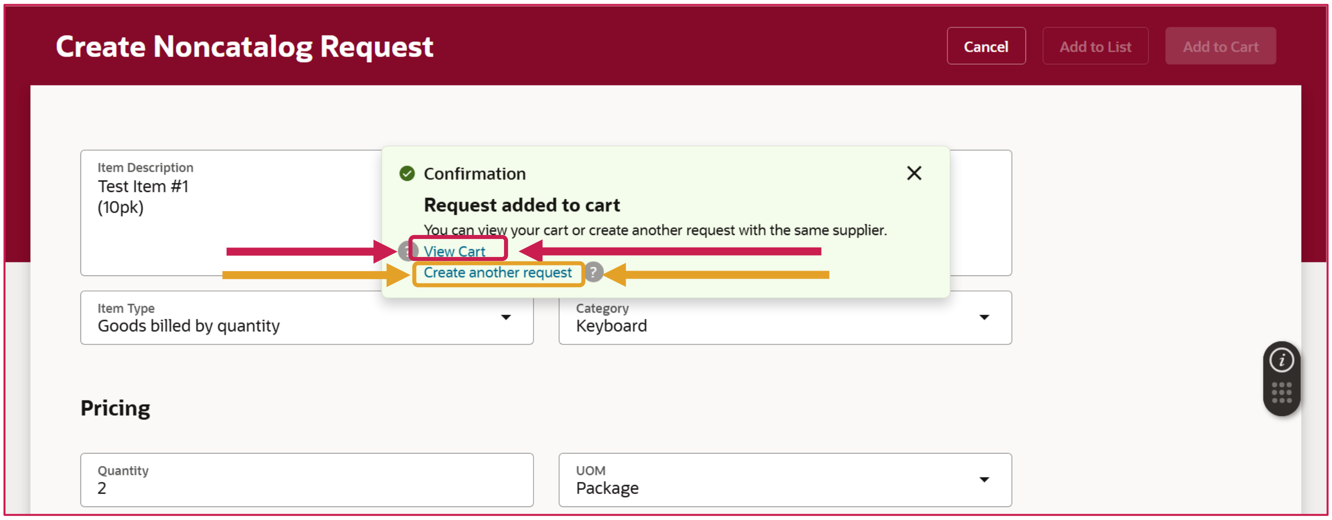


11. Click the **Add to Cart** button at the top



12. A confirmation should pop up, giving you two options:

- ● **View Cart**: Choose this to review your Requisition Summary.
  - Proceed to Step 13.
- ● **Create another request**: Choose this to add another line item to your Requisition.
  - Repeat Steps 3 – 11 for each line item. Once complete, click View Cart and proceed to Step 13.

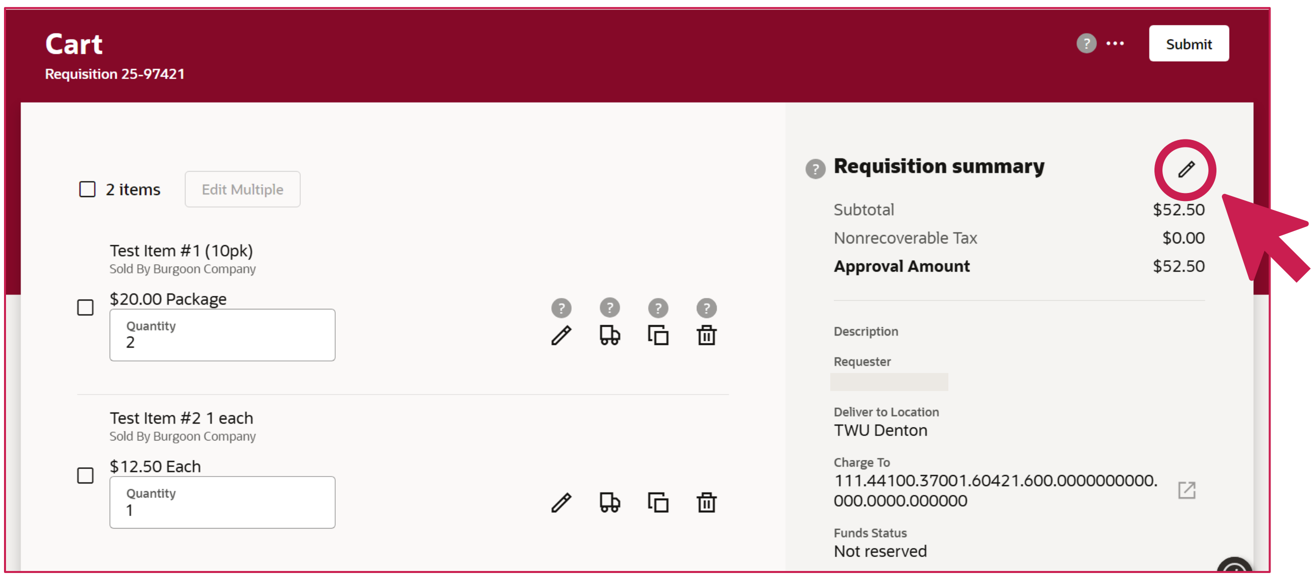


Updating the Requisition Summary

In this section you'll be adding/updating the following:

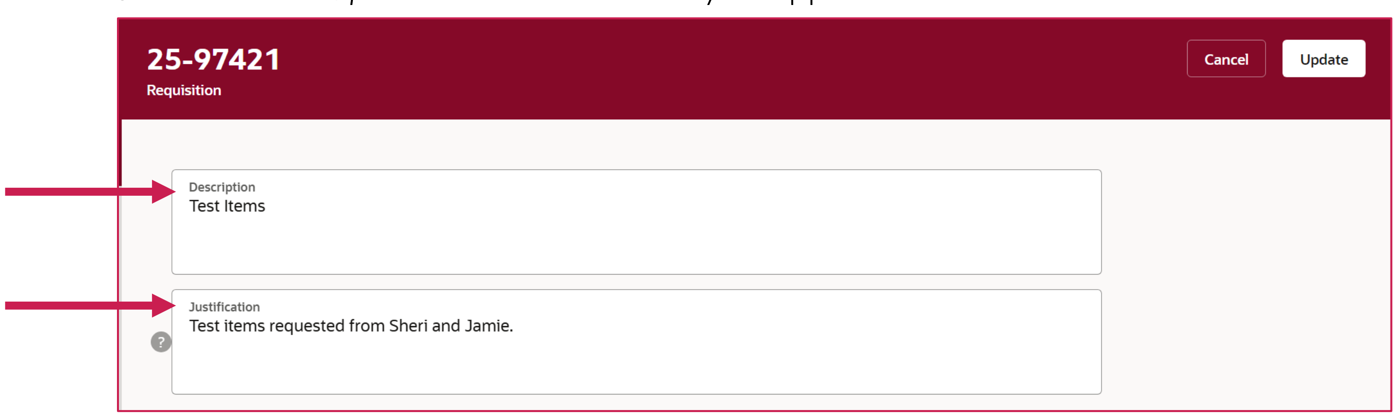
- Description
- Justification
- Deliver to Location
- Charge to
- Note to Supplier
- Attachments

13. From your Cart, click the pencil icon in Requisition Summary



14. **Description**: *Required*. Enter a simple description of your line items.

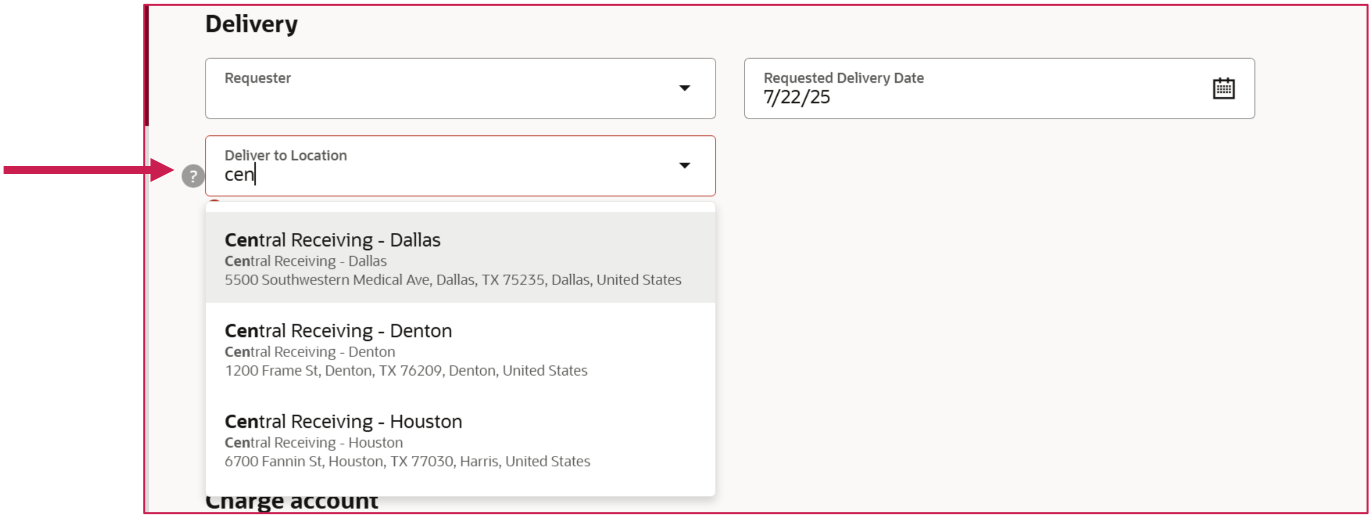
Justification: *Optional*. Provide a note to your approver here.



Note: **Do NOT** check the box for **Emergency Purchase Order Request**. Requisitions cannot be processed when this box is checked.

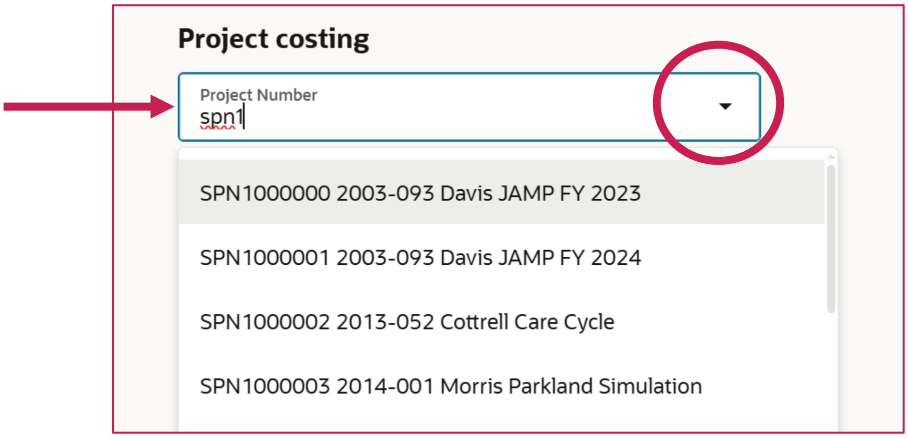
15. Delivery

- Choose a Deliver to Location from the following options:
  - Central Receiving – Dallas
  - Central Receiving – Denton
  - Central Receiving - Houston

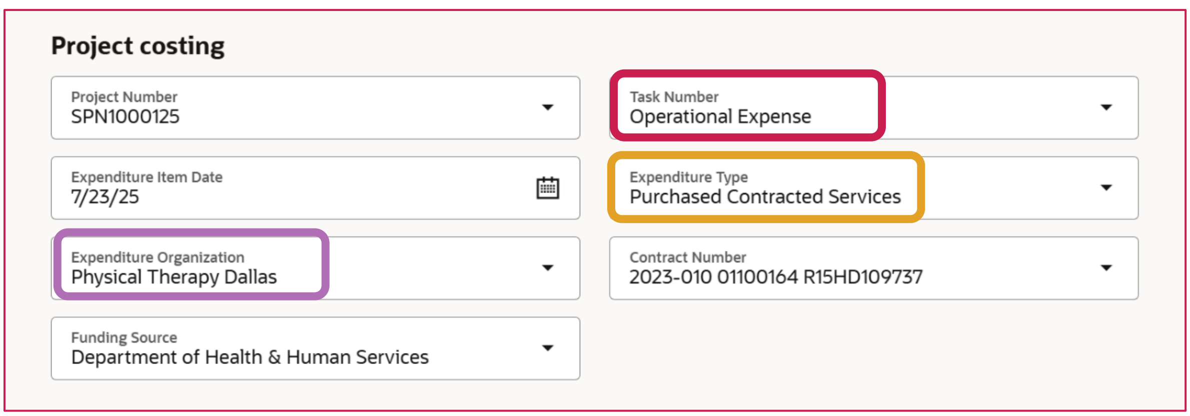


16. Project Costing – For Sponsored Projects

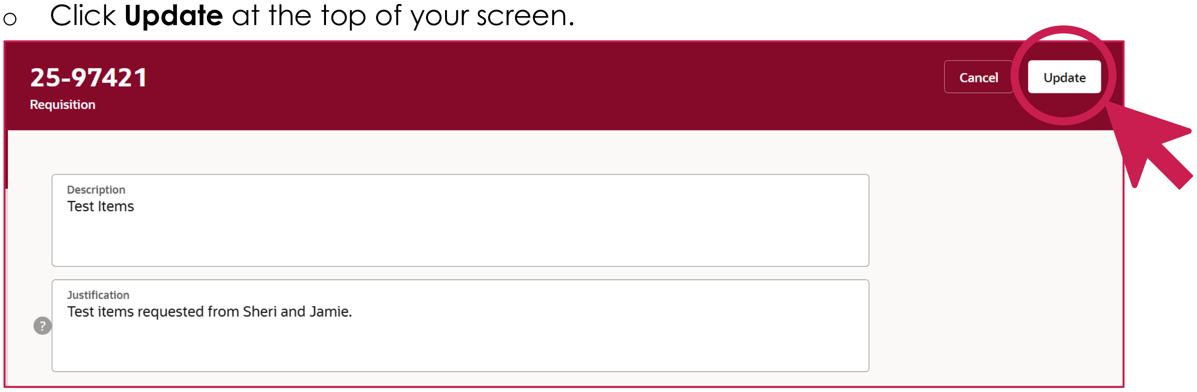
- Find your Project Number. Type "SPN1" into the dropdown menu and select your project number.
- Once selected, additional fields will pop up.



- These fields should auto-populate:
  - Contract Number
  - Funding Source
- You'll need to fill in the following fields:
  - Task Number
  - Expenditure Type
  - Expenditure Organization

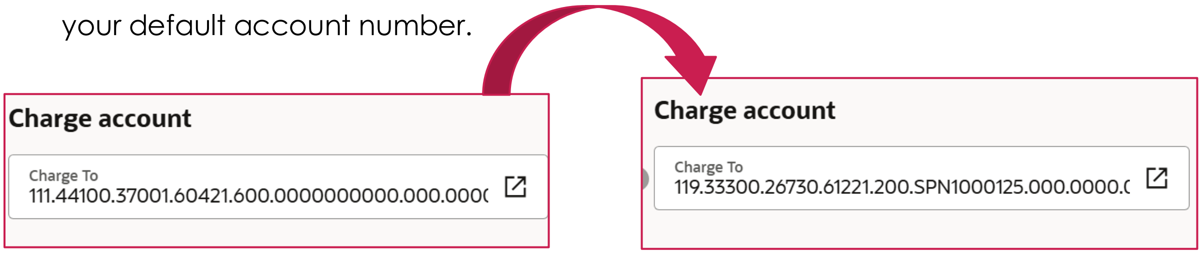


- Click **Update** at the top of your screen.

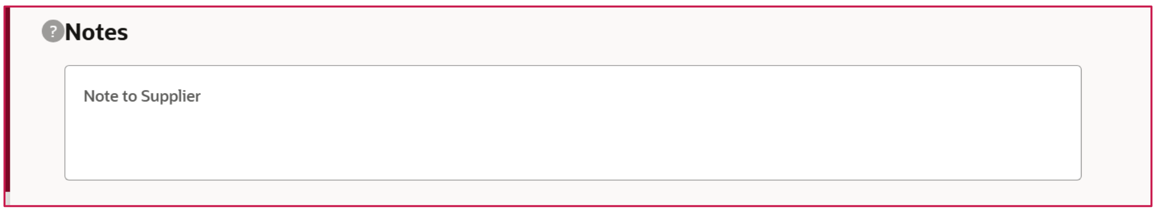


17. Once again, click the pencil icon in your Requisition Summary.

- Scroll down to **Charge Account** and confirm that the Charge Account has changed from your default account number.

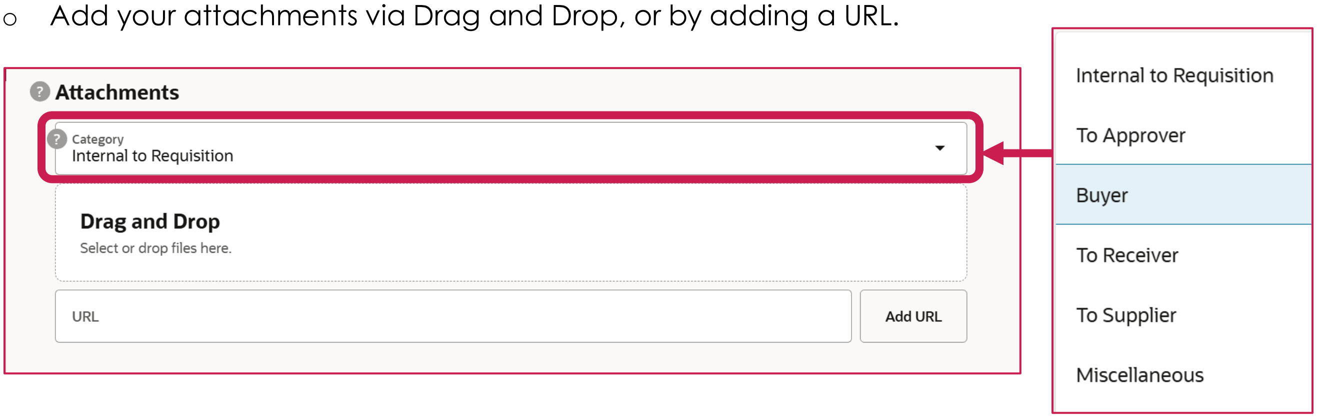


18. Notes: Enter special delivery instructions to the supplier here.



19. Attachments: This is where you'll add attachments to your requisition.

- Change **Category** to **Buyer.**
  - This allows the Buyers in Procurement access to view your attachments.
- Add your attachments via Drag and Drop, or by adding a URL.



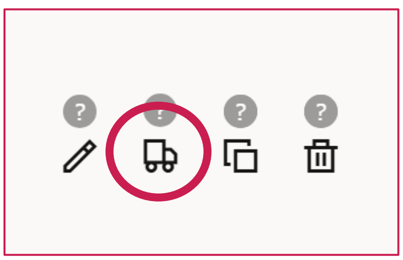
20. Scroll up to the top and click **Update**

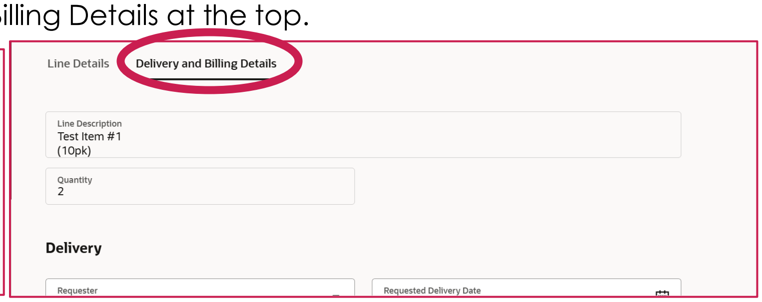
Editing Individual Line Items from the Cart

21. To edit a req line, click the pencil icon  and edit as needed following steps 3 - 11.

22. To verify / edit **Delivery and Billing Details**, you have two options:

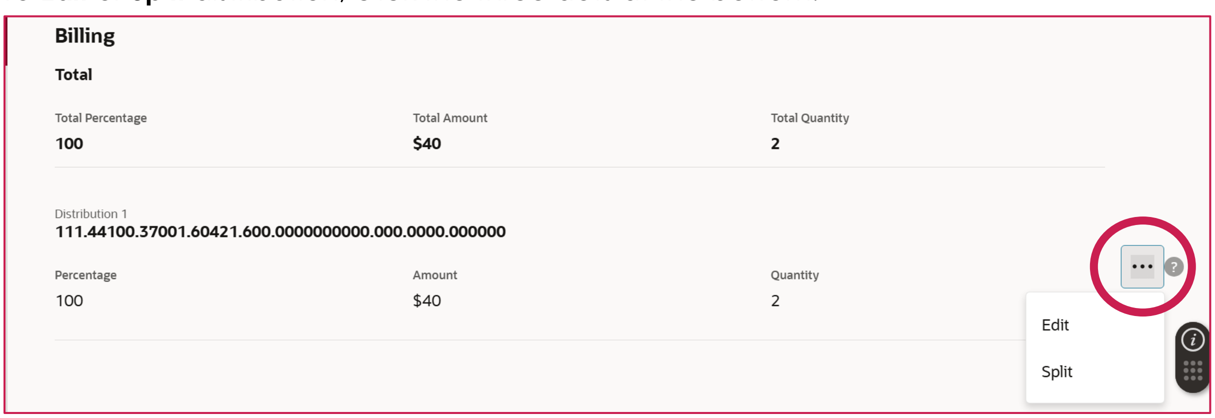
- Click the delivery truck icon  from the cart -or- if you're currently editing a req line, toggle over to Delivery and Billing Details at the top.





  - *Note: Do not use the checkbox labeled "Urgent".*

- To **Edit** or **Split** distribution, click the three dots at the bottom.

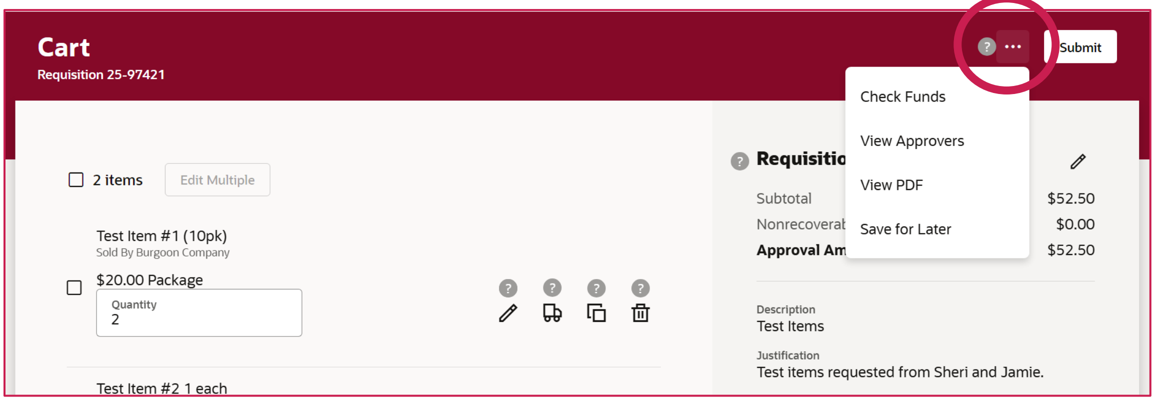


- Once complete, click **Update**. 

Review and Submit

23. Before you submit, you can click the three dots to do the following (if needed):

- **Check Funds**: Allows you to check the budget associated with your account string.
- **View Approvers**: Allows you to view the approvers for this requisition.
- **View PDF**: downloads a pdf version of your requisition to your desktop.
- **Save for Later**: This clears your shopping cart and saves its contents under their requisition number.



24. Review your information and click Submit.

- This submits your requisition for approval.

Important Note: Ordering Noncatalog Items from Tejas

You **cannot combine** non-catalog items on a punchout catalog order.

If you need to order an item from Tejas that **DOES NOT** appear in the catalog, you must process the entire order as a non-catalog requisition.

Failure to do so can result in significant delays in receiving your product.