

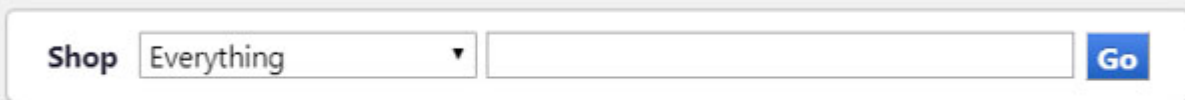


## Objective

Use the Non-Catalog Item to order goods. Processing a Non-Catalog requisition will issue a purchase order(PO) to the supplier. Upon receipt of the PO the supplier will process and ship your order.

## How to Process a Non-Catalog Item

1. Make sure the items you are ordering are not available from one of the Preferred Suppliers. If item is available, please use the Preferred Supplier and place a catalog order.
2. If a preferred supplier is not being used. Make certain the amount of the item is not over the Bid limits for goods of \$50,000.
  - a. If item is over 50,000 it must be bid, please contact procurement to start the bid process. Please see the [Request for proposal guidelines](#) for more information on the bidding process.
  - b. If a Bid Waiver is being requested please attach the completed [Request for Waiver from Competitive Bidding Form](#) to this non-catalog item order.
3. Obtain a Quote from the Supplier or Suppliers Website. The Quote should include all of the items being ordered and a date of quote to ensure current pricing.
4. Log in to ["BobcatBUY"](#).
5. Select the **"Cart icon"**  **Shop**
6. Select **"My Carts and Orders"**
7. Select **"View Carts"**
8. Select **"Create Cart"**
9. Type in **"Cart Name"** The name of Supplier.
10. Type in **"Description"** a brief explanation of the items purchased or their purpose
11. Select **"Normal"** or **"Urgent"**
12. Select **"Save"**
13. Select **"Home"**  **Home**
14. From the Home Page click **"Non-Catalog Item"** under Shop Everything search box.



Go to: [advanced search](#) | [favorites](#) | [forms](#) | [non-catalog item](#) | [quick order](#) Browse: [suppliers](#) | [categories](#) | [contracts](#) | [chemicals](#)

15. Click **"Supplier Search"** to see if your supplier is active for shopping. If your supplier is not active for shopping type **"Not Available"** as the supplier name.
16. Click **"Select"** to choose the **"Supplier"** or type **"Not Available"** as the supplier. **Important Note:** When selecting **"Not Available"** as the supplier name you must attach (under internal attachments) the suppliers [W9](#) or appropriate W8 ([W-8BEN \(Individuals\)](#) or [W-8BENE \(Entities\)](#) or [W-8EXP \(Tax Exempt Organizations\)](#)), along with a [Supplier/Payee Information Form](#).
17. Enter the **"description of the items be ordered"** as it appears on the Quote.
18. Enter the **"Catalog No."** this is typically the item # or part # that the supplier has for the product being ordered. If there is not an item or part number you can re-enter the description in this section again.
19. Enter **"Quantity"** ordered.
20. Enter **"The Price"** for each item.

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21. Select the “**Unit of Measure**” the system defaults to each (EA). **Important Note:** If you have a quote with several line items, you can enter the full amount on one line. However, when completing one line on an order for multiple items, you will need to reverse the quantity and price and use the UOM as LO (lot) rather than each. So the quantity becomes the total of the quoted amount and the price becomes \$.01.
22. Select the “**Commodity Code**” **Important Note:** By clicking the magnifying glass and clicking search you will be able to see the entire list of available commodity codes. These codes will route to the buyer of that commodity. Please select the closest commodity code to what you are purchasing.
23. Select if your product is a Controlled Substance, Recycled, Hazardous Material, Radioactive, Radiation Generating Equipment, Select Agent, Toxin, Energy Star, Green. This is important to track orders that support [Ohio University Sustainability Initiative](#) and [Ohio University Environmental Compliance](#).
24. Select “**Save and Close**” or “**Save and Add Another**”. **Important Note:** Each line should be entered separately by using the option to “**Save and Add Another**” for each line of the quote. If your quote has a line for shipping you should include a line for shipping. For multiple items (more than 10) see step 21.

**Non-Catalog Item** ? X

**Enter Supplier**

or  
Supplier Search

Brief Description of Service	Catalog No.	Quantity	Price Estimate	UOM
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

254 characters remaining expand | clear

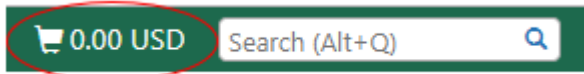
Product Details

Commodity Code

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Radiation Generating Equipment
- Select Agent
- Toxin
- Energy Star
- Green

Save and Close Save and Add Another Close

25. Select the picture of the cart icon in the upper right corner to get into the draft cart of your recent non-catalog item order.



26. Select “**Edit Requisition**” in the upper right of your draft cart.

**Edit Requisition**

27. To add attachment you will click “**Add Attachments**”, select “**Files**”, find the file and select “**Open**”, and “**Save Changes**” to attach your documents. **Important Note:** Your “**Quote**” should be attached in External Notes and Attachments. Your “**Supplier forms**” will be in Internal Notes and Attachments. The only way supplier entry

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will see supplier forms if you have selected **Not Available** as the supplier name to add a new supplier or to process an update to an existing supplier.

28. On the Requisition Summary Tab answer the IT Questions **“Does this cart include the purchase of technology (Software, cloud storage)?”**
29. On the Requisition Summary Tab answer the Compliance Questions **“Does this purchase require A&E Purchasing Exception?”**
30. The **“Billing”** information auto populates except during Fiscal Year End. During the Fiscal Year End the system will prompt for an entry date to determine what Fiscal Year the expense should be processed in. For example 6/30/xx for current fiscal year or 7/1/xx for next fiscal year.
31. Enter your **“Cost Center”** on the Cost Center tab by select **“Account Type”** General Ledger or Grants.
32. Click **“Select from all values”** under Entity Source Org/PTA entry box.

Entity Source Org /PTA

Select from all values...

33. In the Value Box type your **“Entity–Source–Org”** (with the dashes) if you selected General Ledger or Type in **Project–Task–Award”** (with the dashes) if you selected Grants.

Custom Field Search ?

Value

Description

Search

34. Click **“Select”** to the far right of the description.

Value	Description	
10-100000-830030	GENERAL[UNRESTRICTED]FINANCE CUSTOMER CARE	<input type="button" value="select"/>

35. Type in or Select from all values” your **“Activity/Award”**.

Activity/Award

Select from all values...

36. Type in or Select from all values your **“Function” Important Note:** Function is not needed on a Grant Accounts.

Function

Select from all values...

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37. Select **“Save”**.
38. Enter your **“Object Code”** on the Object Code tab by selecting **“Edit”**
39. Enter the **“Object Code”** or **“Select from all values”** to search and select your Object Code.
40. Select **“Save”**

The screenshot shows a software interface for the 'Object Code' field. At the top, the text 'Object Code' is displayed with a blue question mark icon to its right. Below this, a greyed-out instruction reads: 'These values apply to all lines unless specified by line item'. Underneath, the label 'Object Code' is followed by a small 'edit' button. The input field itself is highlighted in yellow and contains the text 'no value' in a light blue font, with a red error icon and the text 'Required field' below it.

41. Select **“Submit”** or **“Assign”**.