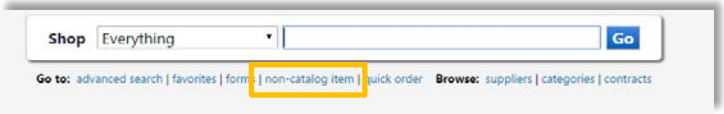
SUBMITTING A NON-CATALOG ORDER FOR TEMPORARY EMPLOYEES

WHAT ARE NON-CATALOG ORDERS?

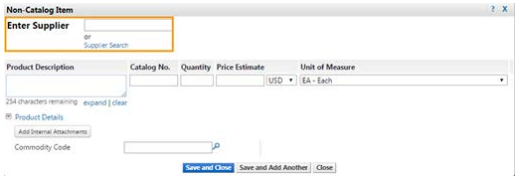
Non-Catalog Orders are intended to address purchasing needs that fall outside of typical requests within a punchout site, catalog or form. Prior to beginning a Non-Catalog Request, ensure your cart contents are empty. Non-Catalog Requests follow a different approval path and cannot be mixed with Purchase Order Forms

LET'S GET STARTED

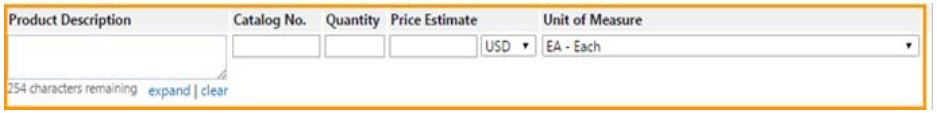
1. Login to i-Buy NYU via the Work tab of **NYUHome** using your Net ID and Password.
2. From the i-Buy NYU home page, click the **Non-Catalog Item** link located in the **Go-To** menu. It appears directly under the **Shop at the Top** search bar.



3. The Non-Catalog link opens a separate order form which includes required fields for Non-Catalog item information. **Enter Supplier** is a search-enabled field which queries the entire NYU supplier directory. If you cannot locate your supplier, you may need to complete a new supplier request form. **Note:** See the New Supplier Requests/Supplier Updates Tip Sheet for more information.



4. Fill in each of the required fields (in bold) with the appropriate information: **Product Description, Quantity, and Price Estimate.** While **Internal Attachments** are not required, they can help facilitate the review and approval of the purchase requisition.

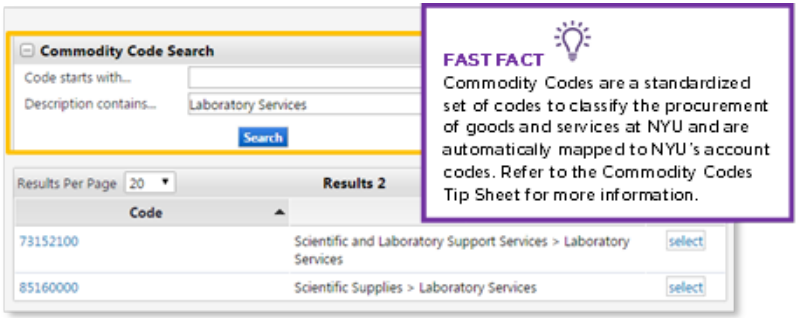


Product Description: Name of temporary employee and service start and end dates
Catalog No: Leave blank
Quantity: Total amount of hours (A 6 week assignment at 40 hours/week, the total hours = 240)
Price Estimate: Hourly Bill Rate (temp hourly rate + agency markup)

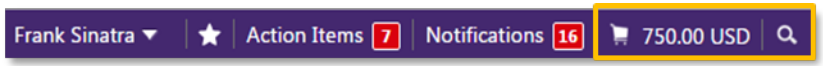
Click Save and **Add** to add an additional line item

Product Description: Ancillary fees
Catalog No: 1
Quantity: 10% of Total amount of hours entered on Line 1
Price Estimate: Hourly Bill Rate (temp hourly rate + agency markup)

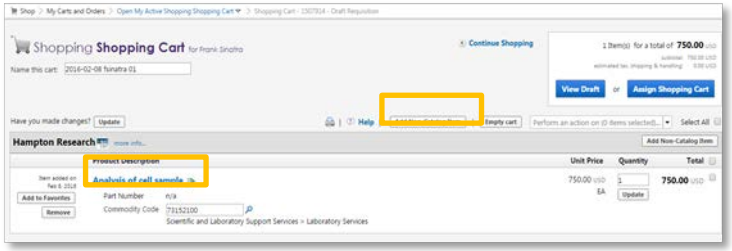
5. **Commodity Codes** can either be entered directly if the code is known, or the can be used to search the directory. Descriptions can also be used, and should be generic rather than specific (e.g. office supplies vs. toner cartridges).



6. Additional line items can be added by clicking **Save and Add Another** located at the bottom of the Non-Catalog Request form.
7. Click **Save and Close** to deposit all non-catalog items into your cart.
8. When you're ready to checkout, click the cart icon located in the top right and then **View My Shopping Cart.**



9. Need to add more items to your cart? Click **Add Non Catalog** Item and repeat the item entry process. To modify a line item, click the **Product Description**, update the item, and click **Save**.



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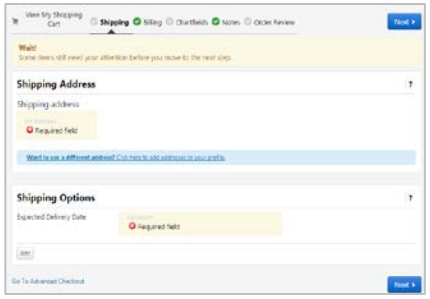
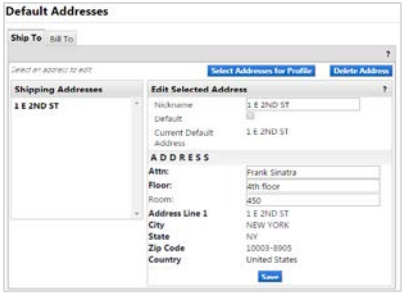
CHECKOUT PROCESS

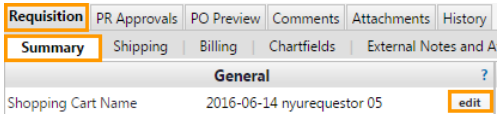
1. Once the shopping cart information is accurate, click View Draft to begin the checkout process.

2. The system will then walk you through a 5-step validation process.
3. Upon your initial requisition effort, you will be prompted to add a shipping address to your profile. If your shipping address has already been defaulted, proceed to Step 5 by clicking Next. If not, click **Want to use a different address? Click here to add addresses to your profile.** Then click **Select Addresses for Profile** and search the directory using either the building name or street number.
3. Once you have selected the desired address, add your **Floor** and **Room** and click **Save**. This will ensure future order requests automatically default your preferred shipping address information. Note: you will retain the ability to change the shipping information as needed.

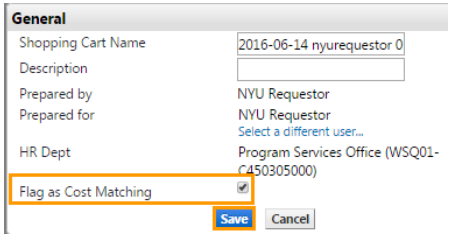




4. Navigate to the Requisition Summary tab. If your non-catalog request is for goods, no action is required. If you're purchasing services from an individual or company, click on the **Edit** button.

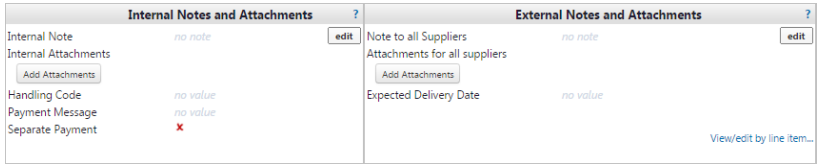


5. A dialog box will pop up, within here, click the **Flag as Cost Matching** checkbox and click **Save.**

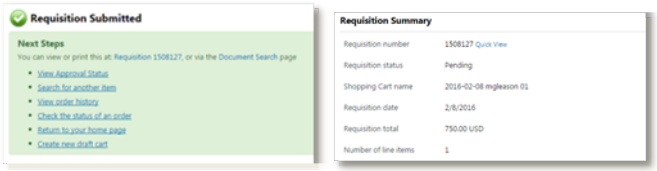


6. Within the Summary tab, scroll down to the **Chartfields** section and click **edit** to enter chartfield values.

7. Your chartfield values may contain Fund, Department, Program, Project and Budget Year. Upon submission of the requisition, the chartfield you have provided will be validated against FAME accounting information to ensure a valid chartfield string and availability of funds. If known, chartfield values can be entered directly into each field, however, clicking the "Select" button allows for the selection from a list of all NYU chartfield values. Once the values have been entered, click Save and Next.
8. The **Notes** section is divided into two fields to allow you to include NYU specific notes to future reviewers (e.g. Department Approvers, Procurement, Accounts Payable) via the **Internal Notes** OR supplier specific notes as part of the PO document via **External Notes**. Click **Edit**, to add relevant notes to the applicable area and then **Save changes**. Proceed to the final step by clicking **Next**.

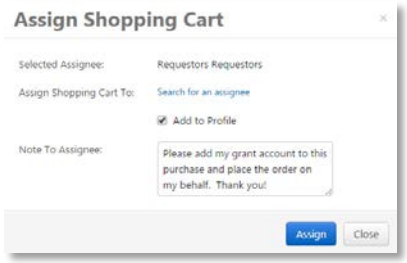
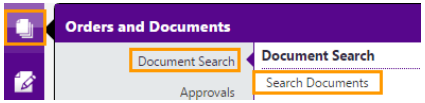
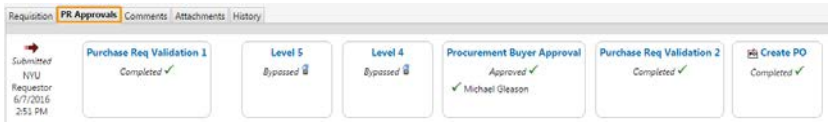


9. Order Review offers the user a final summary review prior to submitting the order for processing. If any of the previous validation steps have not been completed, the user will not be able to proceed. Otherwise, you can click **Place Order.**
10. After clicking **Place Order**, you should be presented with a Confirmation screen that summarizes your request and identifies your requisition number. You have the ability to observe the requisition's approval status among several other search options as noted below.



ASSIGNING A SHOPPING CART

1. The Shopper role does not possess the ability to "Place an order". As a result, Shopper's MUST assign shopping carts to a known department requestor. Not sure who your department's requestor is? Use the Requestor Look-up Tool.
2. Assigning a cart can also be utilized to aggregate multiple items for different users, while still consolidating the request to one order.
3. Clicking the **Assign Shopping Cart** button during the checkout process allows the user to search the NYU directory for their Requestor, add them to their profile to expedite future efforts, and add a note to the assignee which will be delivered to their email via a system notification. Once the requisition has been approved, the Procurement team will review and process further.



1. To view the status of the requisition, use the Document Search or Quick Search feature to access the requisition and click on the **PR Approvals** tab.