

## Non-Catalog Form – OMR Annual Maintenance Agreement (One-Time Payment)

**Non-Catalog Forms** create an electronic requisition used to:

- Submit annual OMR maintenance agreements to the vendor.
  - You may submit all annual maintenance agreements for a single vendor on one requisition.
1. On the *iBuy Homepage*, click the **Non-Catalog Form** link within the **Showcased Services**
  2. On the Non-Catalog Form, within the *Supplier Info* section, type the supplier's name in the **Enter Supplier** text box (note the auto-complete feature)
    - ♦ The supplier's name must be typed as it is in Banner; for an advanced search of suppliers:
      - a. Click **supplier search** link
      - b. Enter the supplier's name or a portion of the name
      - c. Click **Search**; click **Select**
  3. Within the *General Info* section, enter accurate information for:

**Catalog No.** = Vendor's Master Contract #

**Product Description:** Type in the following with a semicolon (;) and return after each line.

- ♦ [Type of Equipment] **Annual Maintenance Agreement**
- ♦ **Period:** MM/DD/YYYY – MM/DD/YYYY
- ♦ [Type] **Make:** Make
- ♦ [Type} **Model:** Model #
- ♦ **SN#:** Serial #

**Quantity:** 1

**Packaging:** 1 **Drop Down:** should = EA-Each

**Estimated Price** = Yearly Amount (from pricing chart)

**Commodity Code** = 93900

! If there are additional agreements for OMR equipment for this vendor, go to the **Available Actions drop down** and select "**Add to Cart**" and select **Go**.

- ♦ Update the appropriate information in the Product Description and Estimated Price fields.
4. Once all agreements for this vendor are added, Select "**Add and go to Cart**" from the **Available Actions drop down**.
  5. Select **Go** (adds the Form to the active Cart, closes the Form, and navigates to the active Cart).
  6. Update the name of the Cart to identify the agreement, e.g., **FY11 [Type of Equipment] Maintenance Agreement**.
  7. Click **Save**.

In the *workflow diagram*, click **Review** to review and edit the draft requisition

### On the Requisition

- ♦ To edit *Requisition* information, select the **Edit** button in each section
  - ♦ To edit by *line item* information, select the **View/edit by line item...** in each section; click the **Edit** button on individual line item
- 5a. To Edit Shipping Address:
    1. Within the *Shipping* section, select **Edit** or **View/edit by line item...**
    2. Choose the Shipping address:
      - ♦ **Select from profile values:** Click the drop-down; select code
      - ♦ **Select from Banner values:**  
Click the **from org address** link; type portion of *ship to* code or portion of address; click **Search**; click **Select**
    3. Enter the *Ultimate Destination* in the **Location** text box
    4. Click **Save**
  - 5b. To Edit FOAPAL Codes: ALL OMR TRANSACTIONS USE **ACCOUNT CODE 147500**

1. Within the *Account Codes* section, select **Edit** or **View/edit by line item...**
2. Click **Select from profile values...** or **Select from all values...** and search by Value (200250-1), or Description (103 Indirect Cost Recovery), or a portion of either Value (200 ) or Description (Indi )
3. To split FOAPAL codes, click the **add split** link and repeat Step 1 above (for details, see the Split FOAPAL Codes Job Aid)
4. Click **Save**

5c. Notes and Attachments:

- ◆ *Internal Notes* and *Attachments* will stay in iBuy and can be shared between departments
- ◆ *External Notes* will go to Banner along with *Attachments* to the vendor

6. To complete the Requisition, click **Place Order** from the *workflow diagram*

7. *The Requisition Information screen appears, at this time you can do one of two things, write down the requisition # to copy for the next month or an easier option is to do the following each month:*

- ◆ By the Requisition number, click "**View**" - This will open the requisition.
- ◆ Select **Copy to New Cart** from the *Available Actions/Options* drop down and select **GO**.
- ◆ This creates a new cart for the next month's meter read that can be updated for each meter read date and Beg/End meter read numbers and quantity.
- ◆ Naming your carts for each month's meter read, e.g., FY11 Copier Annul Maintenance Agreement, and SAVE is highly suggested for easy identification.

*To populate for the current year's annual maintenance agreement:*

- ◆ Click on your History tab
- ◆ Click on the My Requisitions sub-tab
- ◆ Find the Requisition titled with last year's annual maintenance agreement
- ◆ Click on the Requisition number - This will open the requisition.
- ◆ Select **Copy to New Cart** from the *Available Actions/Options* drop down and select **GO**.
- ◆ This creates a new cart for the new year's maintenance agreement that can be updated for each maintenance agreement period.
- ◆ Naming your carts for each year's maintenance agreement, e.g., FY11 Copier Maintenance Agreement, and SAVE is highly suggested for easy identification.

*Repeat process for all lines.*

*Click Place Order*

**Business Manager – Helpful Hints:**

- ◆ If your department needs to submit an annual maintenance agreement and the previous year's submitter isn't available, search for either the Requisition or Purchase Order Number in the "Quick Search" area.
- ◆ If using the Purchase Order – Click on the Requisition
- ◆ Click "**View**" in the Requisition Number Line
- ◆ Copy to a **New Cart** using the **Available Actions/Options** drop down
- ◆ Select **GO**

Anyone in the department is able to access the requisition and simply copy it to a new cart with all the information.

If the requisition or purchase order number isn't available:

- ◆ search using the employee's name in "History",
- ◆ Requisition History,
- ◆ By Requisition #,
- ◆ Click the "Filter" box,
- ◆ Choose a date range,
- ◆ Click "Select User" by the Prepared By,
- ◆ Search for your user,
- ◆ Select the user, Click Search,
- ◆ Select the correct requisition and copy to a new cart.